South Somerset Retail and Main Town Centres Uses Study
Final Report

South Somerset District Council

20 July 2017

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Executive Summary

Convenience Goods Development

The quantitative assessment of the potential capacity for retail floorspace suggests that there is limited scope for new convenience goods development within South Somerset. The convenience goods projections suggest new floorspace could be distributed as shown in Table ES1.

Table ES1 – Convenience Goods Projections

Town	Additional Floorspace Sq. M Gross		
	2017 - 2024	2024 - 2034	Total
Yeovil	14	1,064	**1,078**
Chard	152	326	**478**
Crewkerne	504	107	**611**
Ilminster	0	0	**0**
Wincanton	1,740	282	**2,022**
Other South Somerset	1,513	505	**2,018**
TOTAL	**3,923**	**2,284**	**6,206**

In qualitative terms, food store and convenience retail provision is strong across the District and there are no obvious areas of deficiency in food store provision.

Comparison Goods Development

The comparison goods projections suggest new floorspace could be distributed as shown in table ES2 below. Comparison goods retail provision is reasonably strong in the District, particularly in Yeovil. However, the clothing and footwear shopping offer is weaker in the District, as demonstrated by the high level of expenditure leakage for these types of goods. Yeovil will continue to be the main comparison shopping centre in South Somerset, providing a reasonable range of comparison shops. The other smaller centres have a more limited selection of comparison shops.

Residents also have the choice of visiting larger centres for higher order comparison goods shopping, particularly for clothing/fashion shopping. Taunton is reasonably accessible for residents in the west of the District.

Table ES2 – Comparison Goods Projections

Town	Additional Floorspace Sq. M Gross		
	2017 - 2024	2024 - 2034	Total
Yeovil	5,755	15,753	**21,508**
Chard	264	710	**974**
Crewkerne	94	260	**354**
Ilminster	112	309	**421**
Wincanton	129	352	**481**
Other South Somerset	383	1,052	**1,435**
TOTAL	**6,738**	**18,435**	**25,173**

Investment will be needed in the District in order to retain existing levels of comparison goods expenditure. The objective of the development strategy for South Somerset should be to maintain the District's shopping role and market share within the sub-region. The projections in table ES2 assume that new development will retain the District's share of comparison expenditure in the study area and will help to maintain this share in the future.

Food and Beverage

The food and beverage projections suggest new floorspace could be distributed as shown in Table ES3. Towns in South Somerset generally have a small provision of food and beverage outlets with the proportion of restaurants/cafés (A3), pubs/bars (A4) and takeaways (A5) lower than the national average in most of the smaller town centres. Growth in expenditure should provide opportunities to improve food and beverage provision within all towns.

Table ES3 - Food and Beverage Floorspace Projections (Sq. M gross)

Town	Additional Floorspace Sq. M Gross		
	2017 - 2024	**2024 - 2034**	**Total**
Yeovil	502	1,950	**2,452**
Chard	70	250	**320**
Crewkerne	15	58	**73**
Ilminster	20	81	**101**
Wincanton	76	291	**367**
Other South Somerset	213	834	**1,047**
TOTAL	**896**	**3,464**	**4,360**

Other Uses

South Somerset has a reasonable range of commercial leisure, entertainment and culture facilities, focused primarily in Yeovil. Residents also have access to facilities outside the district, including Taunton. Most of the key sectors are present in South Somerset e.g. cinemas, gyms, theatres, bingo and ten pin bowling. A summary of the key conclusions are set out below.

- South Somerset has a reasonable range of commercial leisure, entertainment and culture facilities, focused primarily in Yeovil. Residents also have access to facilities outside the district, including Taunton. Most of the key sectors are present in South Somerset e.g. cinemas, gyms, theatres, bingo and ten pin bowling.
- There is theoretical capacity for a small boutique cinema (up to 5 screen cinema) in South Somerset District over the plan period.
- There is capacity for 3-5 health and fitness facilities/gym (approximately 50 to 100 stations each) in the District over the plan period.
- There may be scope for an additional small (3-5 lane) ten pin bowling alley in the area.
- There is theoretical scope for one further bingo facility in the District. However, the dispersed population in the District may make this theoretical potential unviable for operators.
- Projections indicate capacity for additional food and beverage outlets, indicating 896 sq. m gross could be supported by 2024, increasing to 2,650 sq. m gross by 2029 and 4,360 sq. m gross by 2034.

The quantitative and qualitative assessment of the potential for new retail and leisure floorspace suggests there is scope for new development within South Somerset, particularly the latter part of the plan period, between 2029 and 2034. However, these long term projections will need to be monitored and kept under review.

The global projections for the District up to 2024 suggest there is scope for around 11,500 sq. m gross of Class A1 to A5 floorspace. The long term projections up to 2034 suggest there is scope for about 35,700 sq. m gross of Class A1 to A5 floorspace.

The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on

average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed and 1% per annum is adopted for food/beverage uses. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

Reoccupied vacant shop units could accommodate up to 5,100 sq. m gross of this projected increase in floorspace. If this reduction in vacant units can be achieved, then the overall Class A1 to A5 floorspace projection for the District up to 2034 would reduce from 35,700 sq. m gross to 30,600 sq. m gross.

The application of shop frontage policies will protect the loss of vacant shop units and will help to encourage appropriate new uses. Long term vacant premises could be targeted and more actively marketed and shopfront/fit-out grants could be considered to assist reoccupation.

In addition to the more traditional town centre uses and as recognised by NPPF (Paragraph 23) the Council should recognise that residential development can play an important role in ensuring the vitality of its centres and should encourage residential development on appropriate sites to increase the amount of people living in and therefore supporting the town centre's services and facilities. A greater population could help to support the evening economy and deliver improvements in the food and drink sector that is currently lacking.

Hierarchy and Strategy for Centres

The development plan should continue to identify the hierarchy of centres within South Somerset. The analysis and projection in this report suggests no changes to the current hierarchy are considered necessary. There have been limited changes since the current development plan was adopted in 2015. All the designated principal, market town, district and local centres perform important roles that should be maintained in order to meet the needs of residents.

Development plan policies should maintain the hierarchy of centres by:

- permitting appropriate town centre uses in order to meet the needs of residents to accommodate growth;
- focus retail, commercial leisure and entertainment uses within town centres (with retail uses focused within the Primary Shopping Areas and other town centre uses within the wider town centre boundaries;
- restricting retail and other town centre uses outside the defined town centres where they fail the sequential approach or impact tests (see suggested impact thresholds below); and
- continue to define primary retail frontages within the main centres to retain an appropriate mix of uses and a predominance of Class A1 retail use within the prime pitch.

Policy Review

Policy EP9 – Retail Hierarchy

The approach set out in Policy EP9 is consistent with the NPPF and the development plan should continue to identify the hierarchy of centres and ensure new main town uses are focused within these town centres. Policy EP9 could be better linked to other policies relating to retail floorspace capacity and impact thresholds in order to provide more guidance on what scale of development is likely to be commensurate with the settlement role. Policy EP9 should also make it clear that the Local Plan objective is to maintain the vitality and viability of the centres identified within the hierarchy, which is linked to Policy EP11. Based on the scale of facilities available within each settlement and the retail floorspace projections in this study, the current retail hierarchy remains appropriate and no changes are required.

Policy EP10 – Convenience and Comparison Shopping in Yeovil

Policy EP10 will need to be updated in line with the revised retail capacity assessment within this report as set out in Tables 8.1 to 8.3. The Council should consider whether Policy EP10 should be expanded to include

floorspace projections for other towns. Due to uncertainties regarding long term growth, Policy EP10 could provide indicative floorspace projections, rather than upper floorspace limits. A schedule of indicative floorspace projections could be included within the policy or supporting text.

Policy EP11 – The Sequential Approach

Policy EP10 is consistent with the NPPF in terms of the sequential approach, PSA and town centre boundary definitions. A small number of amendments should be considered and these are set out in Section 8 of this report.

Policy EP12 – Impact Thresholds

The impact threshold in the NPPF (over 2,500 sq. m gross) remains disproportionate in relation to the existing scale of most town centres within South Somerset. The impact of smaller development should continue to be considered in line with Policy EP12.

Policy EP13 – Protection of Retail Frontages

The NPPF provides limited guidance on the definition of primary and secondary frontages, or how policy should seek to balance diversity and the need to maintain retail uses in town centres. Policy EP13 was adopted after the NPPF was published and the approach is considered to be appropriate although 'Criterion 4' could be strengthened by a minor amendment, as follows:

"The character and nature of the use proposed, including the level of pedestrian activity associated with it and its contribution to the vitality and viability of the centre."

Further minor amendments are suggested in Section 8 of this report.

Policy EP14 – Neighbourhood Centres

Neighbourhood centres are small parades of shops and fall below Local Centres within the hierarchy and would not be considered to be town centres in policy terms. The supporting text to Policy EP14 could be amended to clarify this definition. Policy EP14 could also be cross referenced with Policies EP11 and EP12. Policy EP12 indicates that out of centre development of over 250 sq. m gross will be required to assess retail impact. This figure could also be an appropriate threshold where development above 250 sq. m gross should consider sequential sites within the nearest Town, District or Local Centre.

Policy EP15 – Local Shops, Community Facilities and Services

Access to facilities will become increasingly important and the approach within Policy EP15 should be maintained.

Future Monitoring

The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the short to medium term up to 2024, with longer term forecasts up to 2034.

However, the Council may need to update the floorspace capacity forecasts (also known as an assessment of quantitative need) as it continues to prepare the Early Review Local Plan. Therefore the Council should continue to monitor changes and be aware of the implications for retail floorspace.

Indeed, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections after 2024 should be treated with caution. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;

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

Contents

Figures

Tables

Appendices

Glossary

Benchmark Turnover

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

Class A1

Commercial units classed as retail or shop uses within the Use Classes Order.

Class A1 Services

Non-retail uses classed as A1 in the Use Classes Order, such as hairdressers, travel agents and dry cleaners.

Class A2

Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.

Class A3

Commercial units classed as restaurants and café food outlets within the Use Classes Order.

Class A4

Commercial units classed as public houses or bars within the Use Classes Order.

Class A5

Commercial units classed as fast food or takeaway food outlets selling cooked hot food.

Class C3 Residential

“Dwelling house”, as a principal or secondary residence.

Convenience Goods

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

Comparison Goods

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

Experian

A data consultancy widely used for retail planning information.

Food and Beverage

Class A3, A4 and A5 food and drink outlets, but not food and grocery items including in convenience goods.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,250 town centres across the country.

Gross floorspace

Total external floorspace including exterior walls.

Higher order comparison goods

Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to travel further to purchase these items.

Javelin Venuescore

A database of retail locations that enables the user to rank and sort the UK's shopping venues against a range of different criteria incl. market size, location type, market position and sector.

Lower order comparison goods

Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceuticals and toiletries. Customers are less likely to travel long distances to purchase these items.

Market share/Penetration rate

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

Multiple traders/outlets

National or regional 'chain store' retailers.

Net (sales) floorspace

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

The Requirements List

A published source of information providing known retail and leisure operators' space requirements in towns across the country.

Zone A Rent

The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.

1.0 Introduction

Overview

1.1 Lichfields has been commissioned by South Somerset District Council to prepare a Retail and Main Town Centres Uses Study. The study has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 23), strategic priorities for retail, leisure and commercial development (paragraph 156) and the evidence to assess the need for economic development (paragraph 161). The study has also been completed in accordance with the Planning Practice Guidance (PPG).

1.2 The study will inform the early review of the South Somerset Local Plan (adopted 2015) which will provide the planning policy context for development across the whole of South Somerset up to 2034. Any evidence base study carried out at the current time needs to be cognisant of some significant recent changes:

1 **Changes in policy** - the NPPF heralded the biggest single change in national planning policy in a generation, and it raises the bar for local authorities in terms of the positive approach and a greater emphasis on the deliverability of plans.

2 **Changes in the economy** - there has been significant uncertainty relating to town centres and the retail sector, particularly following the EU Referendum vote. The study must adopt up-to-date and authoritative economic forecasts.

3 **Changes in market** - the above issues have had an impact on the commercial property market dynamics, both in terms of local demand and on the overall ability of developers and firms to access finance.

1.3 The key objective of the South Somerset Retail and Main Town Centres Uses Study is to provide a robust and credible evidence base to inform the Council's work on the review of the Local Plan, taking into account changes since previous evidence was prepared. The updated Local Plan will reflect the emerging housing, employment, retail and leisure needs for the next 17 years, up to 2034.

1.4 The Retail and Main Town Centre Uses Study is based on up to date and sound research. The study establishes existing shopping patterns, based on sound empirical evidence and comprehensive customer survey research, including both customers who use facilities in the District and those who shop elsewhere.

1.5 This report provides a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within South Somerset. It provides a description of existing retail facilities within the District, and it identifies the role the principal centre, market towns, district and local centres play in meeting the needs of customers. The assessment of need includes both food and non-food retailing and eating/drinking away from the home.

1.6 The study includes an assessment of:

1 changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession, the availability of 2011 Census data, the requirements of the NPPF and the recent changes to permitted development rights;

2 the future need and (residual) capacity for retail, food and beverage and leisure floorspace for the period up to 2034;

3 the potential implications of emerging developments both within and outside South Somerset District, in terms of impact on town centres and potential changes to shopping patterns;

4 the existing retail hierarchy and network of centres including advice as to whether any changes are required; and

5 development plan policies, allocations and recommendations on how each centre can develop its role.

Report Structure

1.7 Section 2 summarises the relevant policy context and Section 3 describes the shopping hierarchy. Sections 4 and 5 provide need assessments for retail and other main town centre uses. Section 6 provides an analysis and review of the existing relevant local planning policies. Section 7 provides an analysis of car parking provision within the main centres and Section 8 sets out the recommendations and conclusions.

2.0 Policy Context

National Policy

2.1 The previous 2010 Retail Study was based on the guidance set out in PPS4 which was superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4).

2.2 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

1 local planning authorities should positively seek opportunities to meet the development needs of their area;

2 local plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:

3 any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework when taken as a whole; or

4 specific policies in this Framework indicate development should be restricted.

2.3 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).

2.4 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

1 proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;

2 take account of the different roles and character of different areas, promoting the vitality of main urban areas; and

3 encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.

2.5 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20). In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

1 the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development;

2 the role and function of town centres and the relationship between them, including any trends in the performance of centres; and

3 the capacity of existing centres to accommodate new development.

2.6 In terms of retail development, the NPPF (para. 23) states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, Local Panning Authorities should:

1 recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;

2 define a network and hierarchy of centres that is resilient to anticipated future economic changes;

3 define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;

4 promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;

5 retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive;

6 allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

7 allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;

8 set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;

9 recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and

10 where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.7 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.8 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and Local Planning Authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.9 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq. m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.10 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

2.11 The National Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

2.12 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

2.13 Recent changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres across the country; in particular the amount of Class A1 space is likely to reduce.

Local Policy

2.14 The South Somerset Local Plan (2006 - 2028) was adopted on 5 March 2015. It sets out the long term planning framework for the district up to the year 2028, including policies relating to retail and leisure development in the District.

2.15 Policy EP9 of the Local Plan sets out a four tier retail hierarchy for the District. The hierarchy is as follows:

Table 2.1 South Somerset Retail Hierarchy

Centre	Settlement
Principal Centre	Yeovil
Market Town	Chard, Crewkerne, Ilminster and Wincanton
District Centres	Ansford/Castle Cary, Langport/Huish Episcopi and Somerton
Local Centres	Bruton, Ilchester, Martock, Milborne Port, South Petherton and Stoke sub Hamdon

2.16 Policy EP9 confirms the development of main town centre uses in Yeovil, the Market Towns, District Centres and Local Centres, should be of a scale that is commensurate with the settlement role and function, and does not unbalance the town centre hierarchy.

2.17 Policy EP10 of the Local Plan confirms that the cumulative net increase in convenience goods retail floorspace, beyond existing retail provision and commitments, to be completed in Yeovil, is limited to a figure of 2,400 sq. m (or £29.9m retail expenditure) by 2017, 3,050 sq. m (or £37.8m retail expenditure) by 2022 and 3,800 sq. m (or £47.7m retail expenditure) by 2028.

2.18 The Local Plan states that the overall net increase in comparison goods should be limited to a figure of 12,600 sq. m (or £90.9m retail expenditure) by 2028. The floorspace provision (and retail expenditure) is to be regularly monitored to take account of changing circumstances.

2.19 Policy EP11 of the Local Plan sets out the strategy for main town centre uses (i.e. the sequential approach). In order to sustain and enhance the vitality and viability of town centres, new proposals for town centre uses will be permitted firstly within the defined Yeovil town centre

shopping area and the defined centres within the market towns, district and local centres. This is followed by edge-of-centre locations, then out-of-centre sites that are (or will be), well served by a choice of sustainable modes of transport, and are close to the centre or, in relation to bulky goods retailing, are located immediately adjacent to existing retail warehousing.

2.20 EP11 further states that proposals should be of a scale appropriate to the size and function of the town centre and would help to sustain and enhance the vitality and viability of the centre. Applications for town centre uses which are not in an existing town centre and not in accordance with an up to date development plan should be refused planning permission where the applicant has not demonstrated compliance with the sequential approach to site selection, or there is clear evidence that the proposal, either alone or combined with other recent and outstanding planning permissions, would seriously affect the vitality and viability of a nearby town centre.

2.21 With regard to retail impact, Policy EP12 sets out the impact thresholds for the different tiers of the retail hierarchy. Proposals for retail floorspace above these existing thresholds will require a retail impact assessment. The current impact thresholds are as follows:

Table 2.2 Retail Hierarchy

Category	Settlement	Threshold
Principal Centre	Yeovil	2,500 sq. m
Market Town	Chard, Crewkerne, Ilminster and Wincanton	750 sq. m
District Centre	Langport/Huish Episcopi	500 sq. m
District Centre	Ansford/Castle Cary and Somerton	250 sq. m
Local Centre	Bruton, Ilchester, Martock, Milborne Port, South Petherton and Stoke-sub-Hamdon	250 sq. m

2.22 Local Plan Policy EP13 deals with the protection of retail frontages within the District. The policy confirms that development proposals resulting in the change of use from Use Class A1 (retail) to non-retail on ground floors within the defined Primary Shopping Frontages will be permitted, except where the number or coalescence of such uses would undermine the dominant retail function.

2.23 In order to guide decisions relating to actual numbers and/or coalescence and the impact resulting, the following criteria will be taken into account:

1 the location and prominence of the premises within the shopping frontage;

2 the floorspace and length of frontage of the premises;

3 the number, distribution and proximity to other non-A1 use class premises (or with consent for such use) within the frontage in question and throughout the town centre;

4 the character and nature of the use proposed, including the level of pedestrian activity associated with it;

5 the level of vacancies; and

6 whether the proposed use would give rise to noise, smell or other environmental problem.

2.24 Local Plan Policy EP14 deals with neighbourhood centres and states that the development of such a centre shall be of a scale and type to meet the local needs of the area within which they will be located and must not adversely affect the vitality and viability of any town centres identified by the Local Planning Authority.

2.25 Local Plan Policy EP15 relates to the protection and provision of local shops, community facilities and services. Proposals that would result in a significant or total loss of site and/or premises currently or last used for a local shop, post office, public house, community or cultural

facility or other service that contributes towards the sustainability of a local settlement will not be permitted except where the applicant demonstrates that:

1 alternative provision of equivalent or better quality, that is accessible to that local community is available within the settlement or will be provided and made available prior to commencement of redevelopment; or

2 there is no reasonable prospect of retention of the existing use as it is unviable as demonstrated by a viability assessment, and all reasonable efforts to secure suitable alternative business or community re-use or social enterprise have been made for a maximum of 18 months or a period agreed by the Local Planning Authority prior to application submission.

3.0 Current Provision and Trends

Introduction

3.1 This section outlines national trends that are likely to influence the need for retail and town centre facilities in South Somerset District and the prospects for attracting new investment. It also summarises current provision within the District, which provides the baseline for future projections in later sections of this report.

Retail Trends

3.2 The economic downturn had a significant impact on the retail and leisure sectors. A large number of national operators failed (e.g. BHS, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. At the time of writing BHS and Austin Reed are the latest operators to experience difficulties, which suggests market conditions are still challenging.

3.3 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators has been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

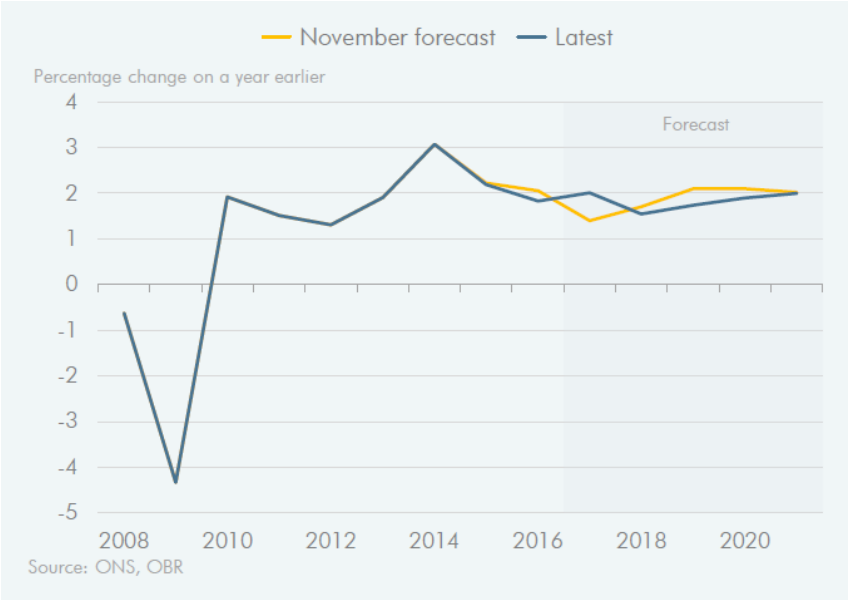
3.4 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term (2017 to 2021). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national trends within the retail sector is set out below.

Expenditure Growth

3.5 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the impact of the EU Referendum is expected to result in slower growth in the short term.

3.6 Figure 3.1 shows the Office for Budget Responsibility's (OBR) latest (March 2017) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014 and 2% in 2015.

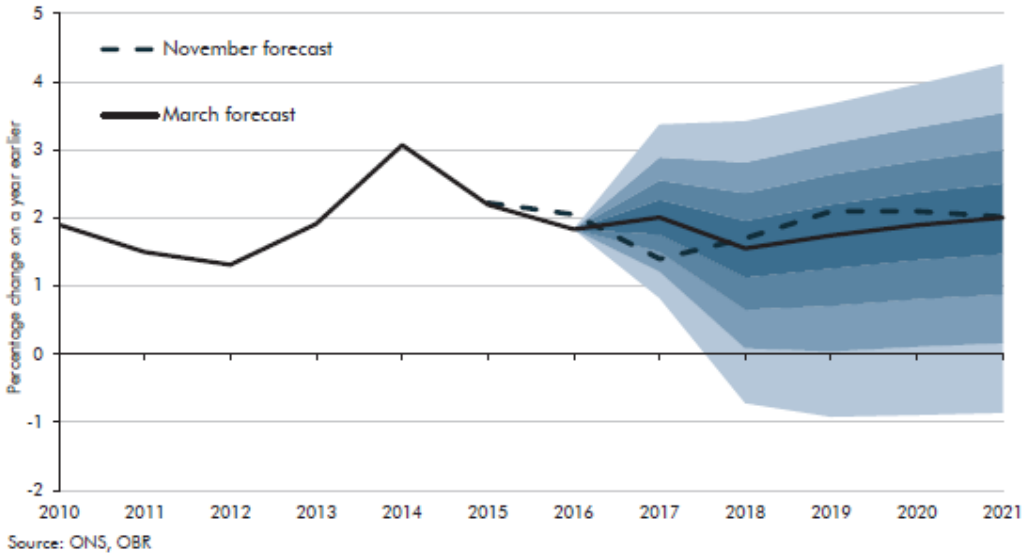
Figure 3.1 Forecast GDP Growth to 2020



Source: OBR Economic and Fiscal Outlook – March 2017

3.7 For 2016 / 2017, growth is expected to sit at circa 2% per year. In terms of future growth the latest projections indicate a fall in 2018 to 1.6% before a steady increase back up to 2% by 2021. The blue shading shows 20% probability bands around the projection line.

Figure 3.2 Real GDP Growth Fan Chart (March 2017)



Source: OBR Economic and Fiscal Outlook - March 2017

3.8 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long term is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. These national trends are anticipated to be mirrored in South Somerset District.

3.9 For convenience goods, Experian's forecasts (November 2016) anticipate limited growth (0.1% per annum) from 2024. For comparison goods, higher levels of growth are expected in the future (3% per annum from 2019), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.10 Experian's latest expenditure projections take into account the implications of the EU Referendum result, indicating this has created major uncertainties regarding the long term outlook for the UK economy. Experian's baseline forecasts reflect a small downgrade in the UK's long term projections for trade, investment and GDP. However the revisions to the consumer spending forecast are minimal, with long term growth expected to remain around 2.3%, underpinned by rises in population and household incomes. Experian Retail Planner Briefing Note 14 (November 2016) states:

"The expansion in comparison goods volumes, averaging 3.2% per head to 2035, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual prices significantly, will not be repeated to the same degree.

Convenience goods recorded a marginal decline in the decade leading up to the 2008 recession. Volumes were severely hit during the recession and its aftermath..... Our central forecast has a renewed squeeze in convenience goods in the short term, before sales per head growth settles at 0.1% a year from 2019 to 2035."

3.11 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad plan data) has increased from around 10% in 2005 to circa 14% in 2012. Vacancy rates have gradually recovered to 11.2% in January 2017.

3.12 Data obtained during centre visits in January 2017, demonstrated that there were 110 vacant Class A1-A5 shop units within the 14 defined centres in South Somerset District. This equates to an overall vacancy rate of 10.5%, which is slightly lower than the Goad national average of 11.2% (as at January 2017). Wincanton and Somerton town centres have the highest vacancy rates (both 18.9%). Yeovil, Milborne Port, Stoke-Sub-Hamdon and Bruton also have vacancy rates higher than the national average (11.8%, 16.7%, 12.5% and 12.1% respectively) although this only represents 1 unit in the small local centres of Milborne Port and Stoke-Sub-Hamdon. Whilst some centres in the District have higher than average vacancy rates, overall the vacancy figures suggest centres in the District are performing satisfactorily post-recession.

New Forms of Retailing

3.13 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within South Somerset District, because they will affect the amount of expenditure growth that will be potentially available to support new development and the strength of operator demand for new floorspace.

Special Forms of Trading/Home Shopping

3.14 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 14 (November 2016) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 15% of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 11.7% in mid-2016 against 4.7% in June 2008…

…non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 59.3 million internet users in the UK (representing 91.6% of the population) in November 2015 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2022. Our forecast has the SFT share of total retail sales reaching 18.6% by 2022 rising to 20.4% by the mid-2030s."

3.15 This retail update makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.16 The implications of these trends on the demand for retail space have been carefully considered. Some retailers operate online sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in online sales may not always mean there is a reduction in the need for retail floorspace.

3.17 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

Food Store Operators

3.18 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store, Little Waitrose and Marks and Spencer's Simply Food formats).

3.19 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 88% between 2011 and 2015, compared to the number of larger format stores which increased by 37% over the same period. The number of Little Waitrose trebled between 2011 and 2015.

3.20 A number of proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats.

3.21 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in South Somerset with Lidl stores in Yeovil, Chard, Crewkerne and Wincanton. The discount sector is actively expanding and Aldi in particular may look for further opportunities in South Somerset District in the future.

Comparison Retailers

3.22 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct have also expanded out-of-centre. This has been evident at Babylon Hill Retail Park where retailers such as Boots, Next and Sports Direct have opened stores at the Park, potentially drawing trade away from Yeovil High Street.

3.23 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak during and after the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. The retail warehouse sector is reasonably well represented on retail parks in Yeovil including at the Houndstone Retail Park, Lysander Road Retail Park and Lynx Trading Estate. However, the availability of a wide range and choice of retail warehouse operators in Taunton is likely to constrain operator demand in South Somerset, particularly to the west of the District.

3.24 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq. m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres, such as Yeovil. In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres such as Yeovil. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.

3.25 The continuation of these trends will influence future operator requirements in South Somerset District with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

Charity and Discount Shops

3.26 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. In many centres, charity shops have occupied vacated shop premises during the recession. This trend is evident in most centres in South Somerset. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts; therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages.

Non Retail Services

3.27 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst Local Planning Authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres.

3.28 Recent changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to

non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres; in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages. However, conversely, it could have an impact on the ability of operators to find space, in areas where demand is higher.

3.29 In our view it is unlikely that these temporary changes will have a significant impact on the majority of centres within South Somerset District, because the current vacancy rates are relatively low. Exceptions to this may be Wincanton and Somerton, which have much higher than average vacancy rates when compared to the national average. A review of these frontage policies is provided later in this report.

3.30 These trends are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.31 Shopping behaviour will continue to change and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out.

Centres in South Somerset and the Surrounding Area

3.32 South Somerset District is bounded by several local authority areas, namely Sedgemoor and Mendip to the north, Wiltshire and North Dorset to the east, West Dorset to the south and East Devon and Taunton Deane to the east.

3.33 The South Somerset Local Plan (adopted 2015) sets the retail hierarchy of South Somerset District (see Table 2.1 above). The location of these centres is shown in Figure 3.3 below.

3.34 The quantitative analysis in this report is based on a defined study area (see Figure 3.4 below or Appendix 1), which covers the primary catchment areas of shopping destinations within South Somerset District. These catchment areas extend beyond the District boundary into neighbouring authorities. The study area is sub-divided into zones for more detailed analysis. The zones broadly reflect the catchment areas of the main centres within the District.

3.35 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The results for the town centre destinations and other relevant centres outside of the District are shown in Table 3.1.

Figure 3.3 Main Centres in South Somerset

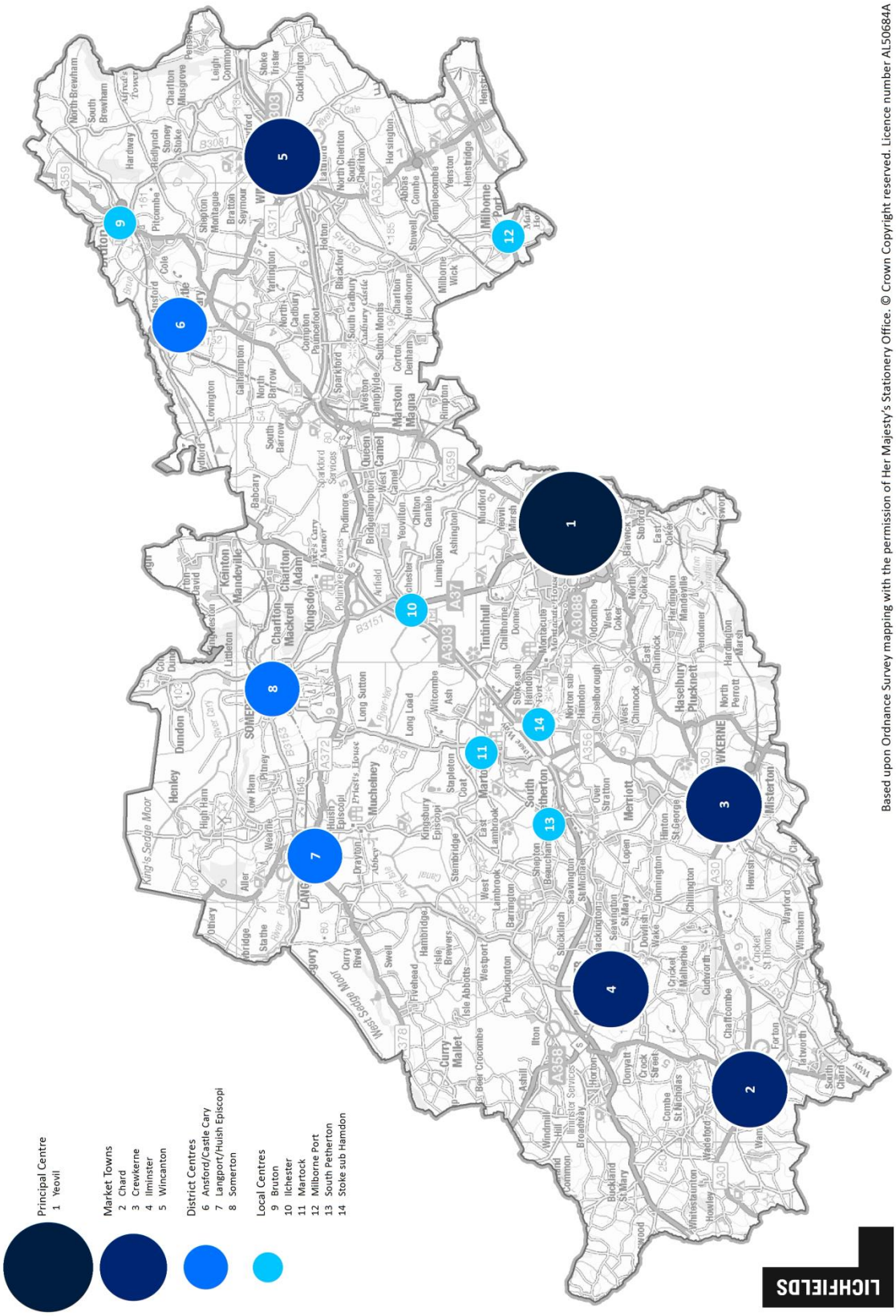
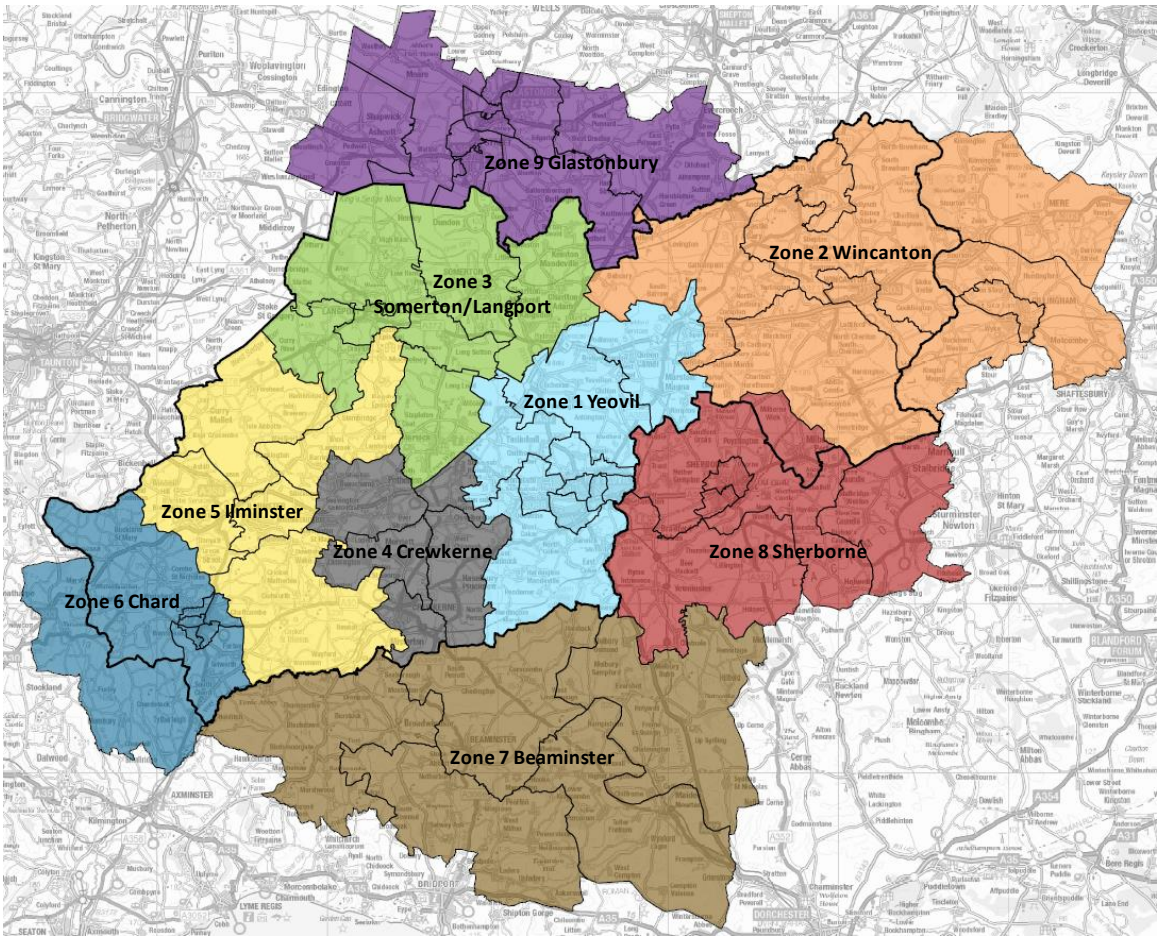


Figure 3.4 Study Area Zones (See Appendix 1 for larger plan)



3.36 At the top of the hierarchy in the region are the cities of Bristol (ranked 13th), Bath (19th) and Exeter (22nd) all of which influence shopping patterns across South Somerset District. Taunton (90th) is at the next tier in the hierarchy and appears to be performing significantly better than Yeovil (160th) which is by far the highest ranked centre in South Somerset District. The next highest ranked centre in South Somerset is Chard (1,044th) with numerous centres outside the District, including Dorchester (217th), Clarks Village (363rd) and Wells (847th) all ranked significantly higher. Ilminster and Wincanton are lower tier centres. Smaller centres in the District have few national multiple retailers and are not included within the Venuescore analysis.

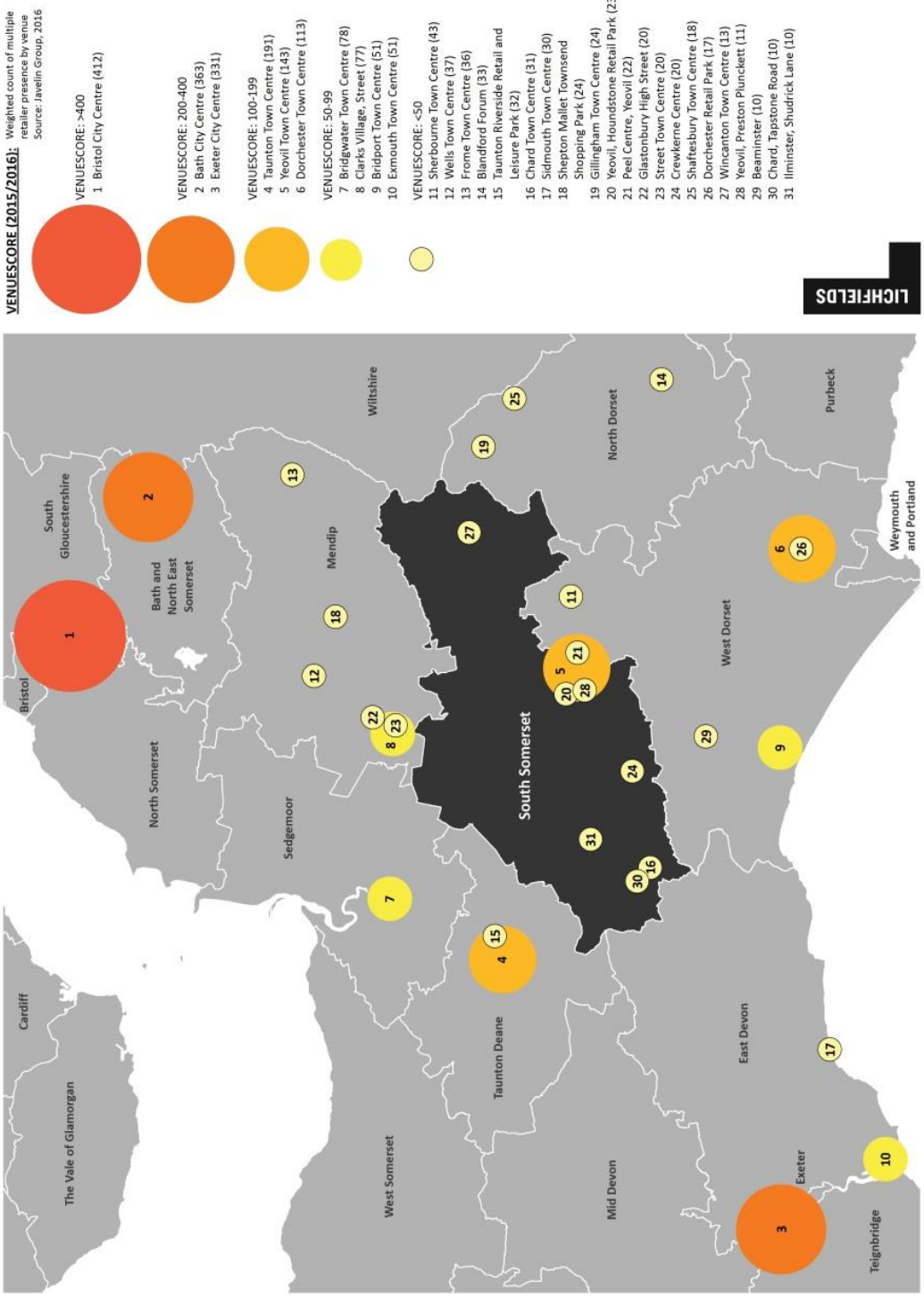
Table 3.1 Venuescore UK Shopping Index and UK Rank

Shopping Destination	Venuescore	UK Rank	Market Position
Bristol City Centre	412	13	Upper Middle
Bath City Centre	363	19	Upper Middle
Exeter City Centre	331	22	Upper Middle
Taunton Town Centre	191	90	Middle
Yeovil Town Centre	143	160	Middle
Dorchester Town Centre	113	217	Upper Middle
Bridgwater Town Centre	78	355	Lower Middle
Clarks Village, Street	77	363	Upscale
Bridport Town Centre	51	592	Upper Middle
Exmouth Town Centre	51	592	Middle
Sherborne Town Centre	43	710	Upper Middle
Wells Town Centre	37	847	Upper Middle
Frome Town Centre	36	879	Middle
Blandford Forum	33	968	Middle
Taunton Riverside Retail and Leisure Park	32	1008	Middle
Chard Town Centre	31	1044	Lower Middle
Sidmouth Town Centre	30	1074	Middle
Shepton Mallet Townsend Shopping Park	24	1325	Middle
Gillingham Town Centre	24	1325	Lower Middle
Yeovil, Houndstone Retail Park	23	1368	Middle
Peel Centre, Yeovil	22	1418	Middle
Crewkerne, Centre	20	1559	Middle
Glastonbury High Street	20	1559	Middle
Street Town Centre	20	1559	Middle
Shaftesbury Town Centre	18	1696	Middle
Dorchester Retail Park	17	1775	Middle
Wincanton Town Centre	13	2377	-
Beaminster	10	3133	Middle

Source: Venuescore, Javelin Group 2016/17

3.37 The location of Venuescore centres is shown in Figure 3.5, and this indicates that residents in South Somerset District have good access to a number of larger centres, as well as having a choice of smaller centres to meet their day to day shopping needs.

Figure 3.5 Venuescore Rankings



Source: Venuescore 2016/17, Javelin Group (as at April 2016)

3.38 It should be noted that the Venuescore data is weighted towards clothing and fashion retailing. Within the sub-region, clothing/fashion shopping facilities are primarily focused in the city and larger town centres. Consistent with this polarisation of clothing/fashion shopping in larger centres, Yeovil, Dorchester and Taunton received very similar scores for fashion orientation.

3.39 Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount (i.e. pound shops) to luxury (i.e. brands such as Chanel) or down-market to aspirational (i.e. lower, middle to upscale), as shown in Table 3.1. Again this information is weighted towards clothing and fashion retailing.

3.40 Each venue has an estimated average market position score based on the retailers present, with the 'market position index' for each centre then calculated by comparing the venue's market position score against the average for all venues.

3.41 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. The market position relates specifically to the fashion offer together with other easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. Javelin also provides other measures of the strength of centres as outlined below.

3.42 The cities (Bristol, Bath and Exeter) within the region are classified as "Upper Middle" whereas Yeovil and most of the other centres in the District are categorised as having a "Middle" market position, which suggests they do not offer the same level of luxury/high quality retailing available within the larger cities which would be as expected. Chard is categorised as having a "Lower Middle" market position, which suggests it caters predominantly for the value/discount sector and less affluent customers.

3.43 Outside of the main cities, Sherbourne, Wells, Bridport and Dorchester have the highest market position "Upper Middle" in the area, despite their relatively low Venuescores. This indicates that these centres have a good provision of high quality independent clothes/fashion shops that are not recorded in the Venuescore.

3.44 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:

1 age focus (is the offer targeting younger or older consumers?); and

2 fashionability of its offer (is the clothing offer traditional or progressive?).

3.45 The Javelin Group classifies retailers in terms of their "fashionability" ranging from "traditional" at one end, then "updated classic", "fashion moderate", "fashion forward" through to "progressive" at the other, i.e. least fashionable to the most fashionable. Shopping destinations in London dominate the most "progressive" venues, such as Carnaby Street and Bond Street.

3.46 The age positon of the fashion offer is also classified ranging from "young", "middle" to "old", for example shops such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and shops such as Wallis and Edinburgh Woollen Mill appealing more to the old. The results for the main centres within South Somerset and the surrounding area are shown in Table 3.2 below.

3.47 The centres within South Somerset tend to cater predominantly for older customers, with moderate or traditional tastes. This reflects the much older age profile of residents within the District. A number of the centres within the District are described as 'Progressive' although the number of fashion shops is limited. There is a small number of national multiples in Chard (New Look and Store 21) and specialist independent retailers e.g. Amour Lingerie in Wincanton. No centres have a fashion forward offer.

3.48 The towns of Chard, Crewkerne, Ilminster and Wincanton are not dissimilar in terms of the Javelin indicators, but these centres have different characteristics. Javelin's information provides an insight into the hierarchy but other factors need to be considered, i.e. the specific role the smaller towns play needs to be considered in more detail.

Table 3.2 Venuescore UK centre Fashion Attributes

Centre	Age	Fashion Position
Yeovil	Mid	Fashion Moderate
Chard Town Centre	Mid	Progressive
Yeovil, Houndstone Retail Park	Old	Fashion Moderate
Crewkerne, Centre	Old	Traditional
Wincanton Town Centre	Old	Progressive
Taunton	Old	Updated Classic
Exeter	Mid	Fashion Moderate
Dorchester	Old	Traditional
Clarks Village, Street	Old	Updated Classic

Source: Venuescore, Javelin

3.49 The Javelin information outlined above, indicates that Yeovil is the most significant shopping destination in the District, and has the best prospects for attracting future growth and major investment.

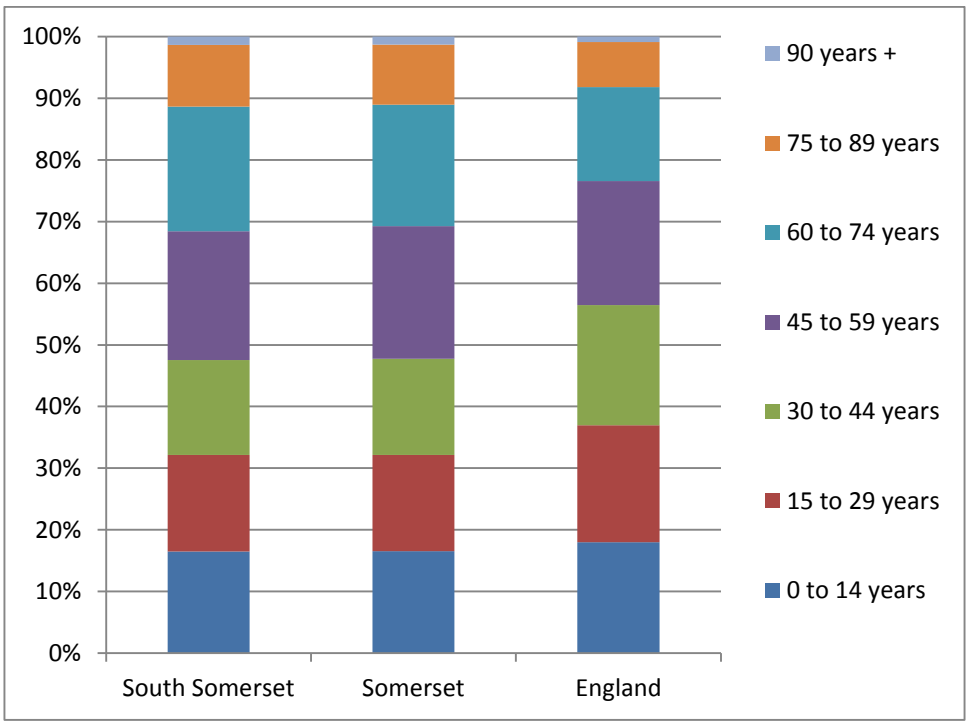
Age Demographic

3.50 The existing 2017 age profile of South Somerset District is shown in Figure 3.6 below. South Somerset District has a slightly older age structure than the average for England, with higher proportions of older age residents (65+ years) and lower proportions of those aged under 44. South Somerset's age structure is similar to the Somerset County's structure.

3.51 The projected age structure in South Somerset between 2017 and 2034 is shown in Table 3.3. The proportion of elderly residents over 60 years is projected to increase from 31.6% in 2017 to 38.8% in 2034.

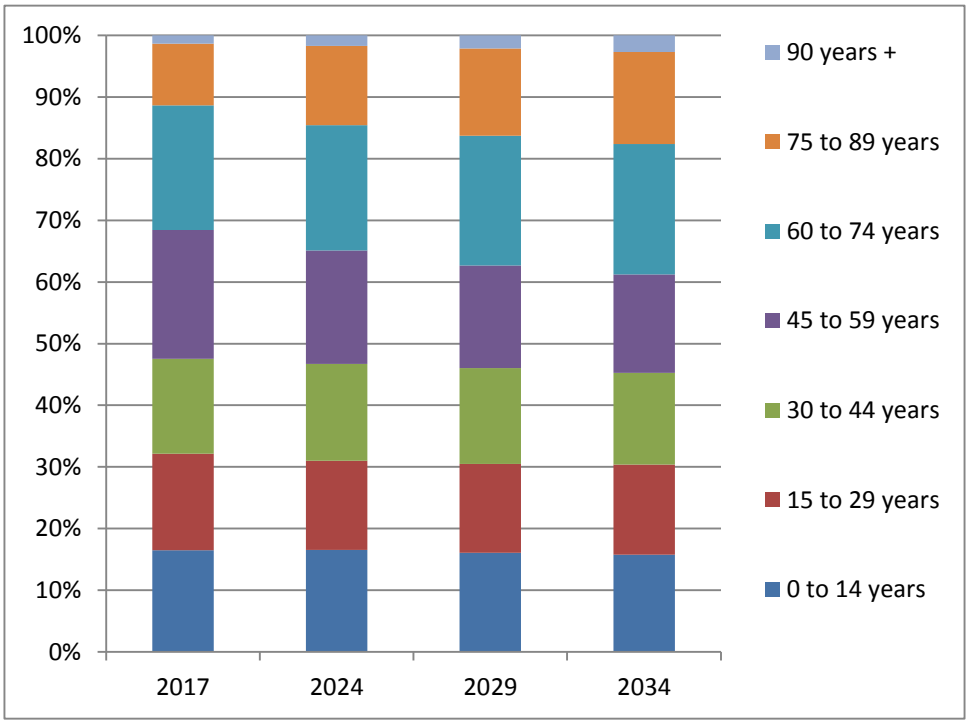
3.52 In terms of absolute numbers, all age categories in South Somerset are expected to see an increase in population, with the middle age category (45 to 59 years) the only exception. The change in total population within each category is shown in Table 3.3. Most of the population growth is attributed to the older categories (60 and over). The middle aged category is projected to decrease significantly (-14%) and this decline will not be fully offset by the growth in younger age groups. The implications of these trends are addressed in later sections.

Figure 3.6 Population Age Structure 2017



Source: Office of National Statistics – Subnational population projections 2014

Figure 3.7 South Somerset District Age Profile Projections 2017 to 2034



Source: Office of National Statistics –Subnational population projections 2014

Table 3.3 South Somerset Population Change 2017-2034

Age	Change in Population	% Change
0-14	+1,000	+3.6%
14-29	+500	+1.9%
30-44	+1,200	+4.7%
45-59	-5,900	-16.9%
60-74	+4,700	+14.0%
75-89	+10,400	+62.3%
90+	+2,600	+113.0%

Source: ONS 2014 Population Projections

3.53 The ageing population is likely to have implications for retail and leisure activity over the plan period.

4.0 Future Requirements for Retail Uses

Introduction

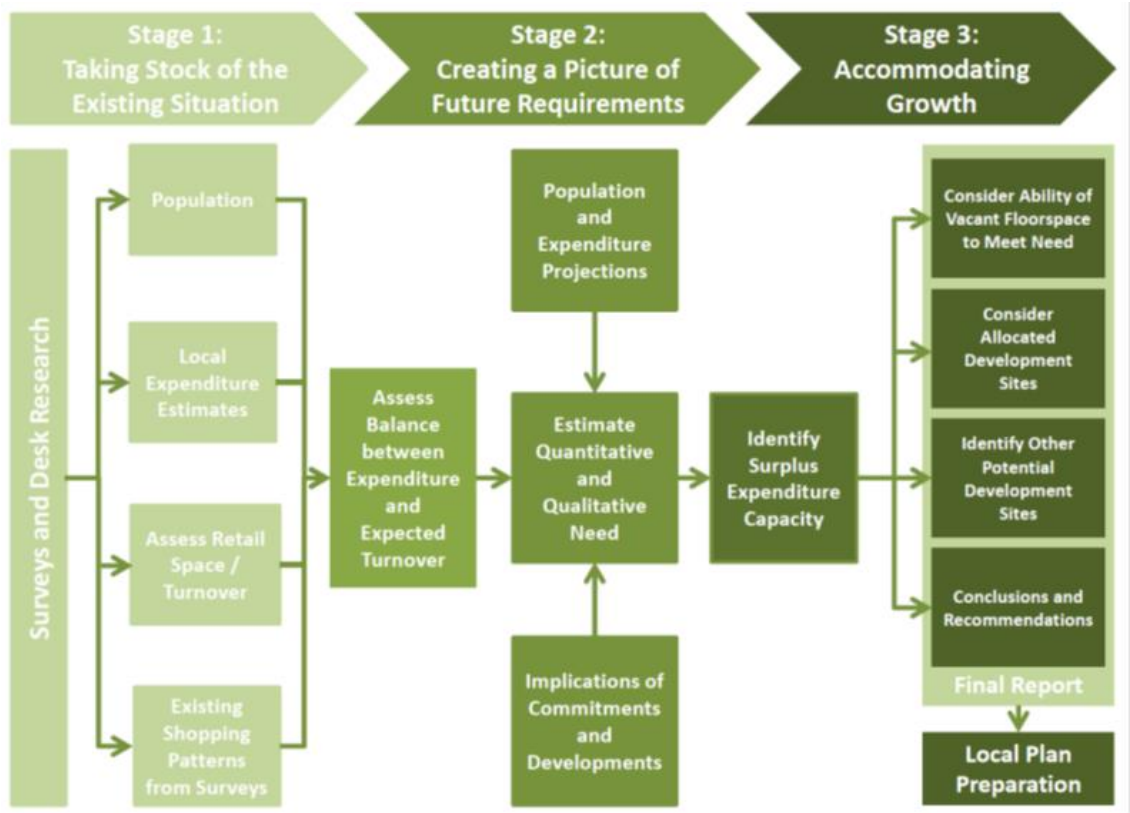
4.1 This section assesses the need for Class A1 to A5 retail uses within South Somerset District. The NPPF (para. 14) indicates that Local Planning Authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

4.2 This section objectively assesses the quantitative and qualitative scope for retail uses in South Somerset District for the period 2017 to 2034. It sets out the methodology adopted and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health checks in Appendix 5.

Methodology and Base Data

4.3 The methodology is summarised in Figure 4.1. The approach adopted to produce retail projections follows the key steps identified within the Planning Practice Guidance (PPG). The approach adopts economic growth forecasts that are widely used and accepted for development plan preparation and at planning inquiries.

Figure 4.1 Methodology for Estimating Future Requirements for Retail Floorspace



Source: Lichfields

4.4 Stage 1 establishes existing demand (population and expenditure) and supply (floorspace and facilities). Stage 2 assesses the balance between supply and demand and projects forward to

quantify future requirements for new facilities. Stage 3 considers how future growth should be distributed and accommodated.

Price Base

4.5 All monetary values expressed in this study are at 2015 prices, consistent with Experian's base year expenditure figures for 2015 (Experian Briefing Note 14, November 2016) which is the most up to date information available.

Study Area

4.6 A study area has been defined to cover these catchment areas and a household telephone survey has been undertaken in order to quantify existing shopping and leisure patterns. The study area defined in the 2010 study has been reviewed and amended to better reflect the distribution of population and main centres within the District and beyond.

4.7 The study area covers the primary catchment areas of the town centres in South Somerset. The primary catchment area is the hinterland where each town/shopping destinations attracts the majority of its trade. The study area has been sub-divided into 9 zones as shown in Appendix 1, based on ward boundaries, reflecting the primary catchment areas of the main destinations within the District i.e. Yeovil, Chard, Crewkerne, Ilminster and Wincanton as well as those beyond i.e. Street.

Population

4.8 The projected population within the study area between 2017 and 2034 is set out in Table 1, Appendix 2. Base year population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected forward up to 2034 using the Office of National Statistics' latest 2014-based sub-national population projections (published May 2016).

4.9 The base year (2017) population within the study area is 247,947 which is projected to increase by 12.9% to 279,949 by 2034. It's noted that the Taunton and South Somerset SHMA predicts a population growth range of between 11.8%-13.9%. The figure used thus falls broadly in the middle of this range.

4.10 Future population projections are likely to change during the development process. It will be necessary to monitor and test the implications of these changes, and revised floorspace capacity figures may need to be produced. The implications of potential these changes to population projections are not expected to significantly change the floorspace capacity estimates in this report.

Retail Expenditure

4.11 The level of available expenditure to support retailers is based on first establishing per capita levels of spend for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2017 have been obtained.

4.12 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 14, November 2016) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and values,

broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Growth Rates

4.13 Experian's EBS growth forecast rates for 2016 to 2018 reflect the current economic circumstance and post Brexit forecasts. Experian provides an appropriate growth rate for the short term as per Table 4.1 below. In the longer term it is more difficult to forecast year on year changes in expenditure. However, Experian's longer term growth average forecasts have been adopted and are set out in the below table.

Table 4.1 Post-Brexit Growth Forecasts

Year	Convenience Goods Growth Forecasts	Comparison Goods Growth Forecasts
2016	0%	+3.3%
2017	-0.2%	+1.4%
2018	-0.9%	+1.0%
2019-2023	0%	+3.0%
Post 2023	+0.1%	+3.2%

Source: Experian Briefing Note 14 (November 2016)

4.14 For context, the pre-Brexit forecast for convenience and comparison goods in the short term were:

Table 4.2 Pre-Brexit Forecasts at 2016

Year	Convenience Goods Growth Forecasts	Comparison Goods Growth Forecasts
2016	+0.1%	+3.2%
2017	+0.3%	+2.9%
2018	+0.1%	+3.0%

Source: Experian Briefing Note 14 (November 2016)

4.15 As can be seen, these growth rates are relatively cautious when compared with past growth rates, but in our view represent a realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading

4.16 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling.

4.17 SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. The Experian information suggests that non-store retail sales in 2017 will be:

- 10.7% of convenience goods expenditure; and
- 18.5% of comparison goods expenditure.

4.18 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because

some of it relates to internet sales through traditional retail businesses, rather than internet companies.

4.19 The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures for SFT are set out in Table 4.3. These figures have been adopted in this assessment.

Table 4.3 Adjusted SFT Figures

Year	Convenience (%)	Comparison (%)
2017	3.2%	13.8%
By 2021	3.9%	15.6%
By 2031	5%	16.3%

Source: Experian Briefing Note 14 (November 2016)

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

4.21 On-line shopping has experienced rapid growth over the last 20 years, but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.6% by 2022, rising to 20.4% by the mid-2030s.

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

Forecast Spend Per Head

4.23 Table 2, Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2034. Forecasts of comparison goods spending per capita are shown in Table 2, Appendix 3. Forecasts of food and beverage spending per capita are shown in Table 2, Appendix 4.

4.24 Table 3, Appendix 2 sets out total convenience goods within the study area up to 2034 (population multiplied by average expenditure per capita). Forecasts of comparison goods spending are shown in Table 3, Appendix 3. Forecasts of food and beverage spending are shown in Table 3, Appendix 4.

4.25 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by circa 7% from £562.04 million in 2017 to £601.36 million in 2034, as shown in Table 3, Appendix 2. Comparison goods spending is forecast to increase by some 75% between 2017 and 2034, increasing from £801.02 million in 2017 to £1,400.84 million in 2034, as shown in Table 3, Appendix 3. These figures relate to real growth and exclude inflation.

4.26 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. Growth is still likely to be less than was previously envisaged pre-Brexit.

Market Shares/Penetration Rates

4.27 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the January 2017 household survey.

4.28 The total turnover of shops within South Somerset District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel's Retail Rankings and Supermarkets UK Report (2016), which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

4.29 The results of the household shopper questionnaire survey undertaken by NEMS in January 2017 have been used to estimate existing shopping patterns within the study area zones. The tabulated results are shown in Appendix 6.

4.30 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

4.31 The market shares for comparison goods shopping are shown in Table 4, Appendix 3 and food and beverage (Class A3 to A5) are shown in Table 4, Appendix 4.

Benchmark Turnover Levels

4.32 Company average turnover of sales floorspace densities are available for major food store operators and are compiled by Mintel in its Annual 'UK Retail Rankings' Report. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

4.33 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and Lichfields' own on-site surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

4.34 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within South Somerset District and Lichfields' experience of trading levels of small independent shops an average sales density of £5,000 per sq. m net for convenience shops/stores in the District has been adopted. The total benchmark turnover of identified convenience sales floorspace within the main centres in South Somerset District is £321.46 million (Table 10, Appendix 2).

4.35 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges between £5,000 and £8,000 per sq. m net. The average sales density for food and beverage outlets is usually around £5,000 per sq. m gross.

Existing Spending Patterns

Convenience Shopping

4.36 The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. A summary of food and grocery shopping patterns for main food shopping trips for the most frequently used stores by zone is shown below in Table 4.4.

Table 4.4 Main Food Shopping Destinations Most Used by Respondents by Zone

	Destination	Destination Zone
Zone 1 (Yeovil Area)	Tesco Extra, Yeovil (28%)	1
	Asda, Yeovil (26%)	1
	Morrison's, Yeovil (13%)	1
Zone 2 (Wincanton Area)	Morrison's, Wincanton (33 %)	2
	Lidl, Wincanton (12 %)	2
	Tesco, Shaftesbury (11%)	outside
	Asda, Gillingham (10%)	2
Zone 3 (Somerton/Langport Area)	Tesco Metro, Langport (23%)	3
	Tesco Extra, Yeovil (17%)	1
Zone 4 (Crewkerne Area)	Asda, Yeovil (26%)	1
	Lidl, Crewkerne (17%)	4
	Waitrose, Crewkerne (15%)	4
Zone 5 (Ilminster Area)	Tesco Metro, Langport (10%)	3
	Tesco, Ilminster (38%)	5
Zone 6 (Chard Area)	Tesco, Chard (54%)	6
	Lidl, Chard (20%)	6
Zone 7 (Beaminster Area)	Morrison's, Bridport (21%)	outside
	Waitrose, Crewkerne (11%)	4
	Waitrose, Bridport (10%)	outside
Zone 8 (Sherborne Area)	Sainsbury's, Sherborne (40%)	8
	Waitrose, Sherborne (10%)	8
Zone 9 (Glastonbury Area)	Sainsbury's, Street (33%)	9
	Tesco, Glastonbury (27%)	9
	Tesco, Shepton Mallet (11%)	outside

Source: NEMS Household Survey (February 2017)

4.37 The survey results indicate a relatively limited level of cross flow of main food shopping trips with the majority of respondents completing their food shopping within the zone of origin. Food stores in South Somerset District retain a relatively high proportion of main food and grocery shopping trips generated by residents in the District (broadly the Core zones[1] 1 to 6). Households in the District have good access to a number of large food stores. Outside the

[1] Core Zones – Zone 1 (Yeovil Area), Zone 2 (Wincanton Area), Zone 3 (Somerton/Langport Area), Zone 4 (Crewkerne Area), Zone 5 (Ilminster Area), Zone 6 (Chard Area)

District (Zones 7 to 9), respondents tend to shop at other destinations i.e. Zone 7 (Beaminster Area) in Bridport, Zone 8 (Sherborne Area) in Sherborne and Zone 9 (Glastonbury Area) in Street, Glastonbury and Shepton Mallet.

4.38 Table 4, Appendix 2 indicates the proportion of total convenience goods expenditure (main and top up trips) within each zone attracted to each destination. South Somerset District retains between 53% and 95% of convenience goods expenditure within the six core zones[2] in the District (zones 1-6). The lowest retention rate (53%) is Zone 2 (Wincanton Area), but this zone includes Gillingham. The highest retention rates are in Zone 1 (Yeovil Area) and Zone 4 (Crewkerne Area) (both 95%). Retention rates are around 92% in Zone 6 (Chard Area), 80% in Zone 5 (Ilminster Area) and 75% in Zone 3 (Langport/Somerton Area).

4.39 The level of convenience goods expenditure attracted to shops/stores in South Somerset District in 2017 is estimated to be £367.29 million as shown in Table 5, Appendix 2, applying the market shares set out in Table 4.£348.91 million, 95% of the expenditure is attracted to the main centres listed in Table 10, Appendix 2.

4.40 The total benchmark turnover of identified existing convenience sales floorspace within the main settlements in South Somerset District is £324.59 million (Table 10, Appendix 2), compared with the actual turnover of £348.91 million in 2017. Overall South Somerset has a relatively high retention of convenience goods expenditure and there is only limited potential to increase this level of retention. The base year figures suggest that convenience goods retail sales floorspace in most of the main settlements in the District is collectively trading higher than the national average, and appears to be trading satisfactorily, with an expenditure surplus of £24.32 million in 2017, this being the difference between the actual spending at retail facilities in the District and the benchmark turnover of the facilities. A breakdown for each town is set out in Table 4.5.

Table 4.5 Convenience Goods Turnover at 2017 – Deficit/Surplus £Millions

Destination	Turnover £M	Expenditure £M (+ Surplus / - Deficit)	Index Benchmark = 100
Yeovil town centre	53.44	-2.96	98
Yeovil other	121.20	-	-
Chard	45.95	0.14	100
Crewkerne	25.97	2.58	111
Ilminster	18.50	-4.90	79
Langport	15.94	5.92	159
Somerton	8.77	2.06	131
Wincanton	45.84	13.01	140
Castle Cary	7.80	5.53	343
Martock	5.25	2.00	161
Ilchester	0.26	0.11	172
Other South Somerset	18.39	-	-
Total	**367.29**	**24.32**	**107**

Source: Tables 10 and 12 in Appendix 2

4.41 Facilities within Ilminster are trading below benchmark level, which suggests existing floorspace can absorb future expenditure growth. Yeovil and Chard are trading around their benchmark. Convenience goods facilities in Crewkerne (following the closure of Budgens), Langport, Somerton, Wincanton, Castle Cary, Martock and Ilchester appear to be trading healthily above

[2] Core Zones – Zone 1 (Yeovil Area), Zone 2 (Wincanton Area), Zone 3 (Somerton/Langport Area), Zone 4 (Crewkerne Area), Zone 5 (Ilminster Area), Zone 6 (Chard Area)

benchmark levels. Surplus expenditure in these towns could support future improvements in provision. A qualitative analysis of convenience goods provision is set out later in this section.

Comparison Shopping

4.42 A summary of comparison goods shopping patterns is shown in Table 4.6. Results are provided for the District (broadly Zones 1 to 6), outer zones and the study area as a whole. The retention of comparison goods shopping trips within South Somerset is lower than for convenience goods shopping. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and travel longer distances to visit larger centres that have a better range and choice of shops (i.e. Taunton).

4.43 Respondents were asked at Question 8 of the household survey where they generally buy most of their household's non-food shopping on a zone by zone basis. Yeovil was the most popular answer for Zone 1 (Yeovil Area - 66%), Zone 2 (Wincanton Area - 42%), Zone 3 (Somerton/Langport Area - 39%), Zone 4 (Crewkerne Area - 63%) and Zone 8 (Sherborne Area - 43%). Taunton was the most popular answer for Zone 5 (Ilminster Area - 43%) and Zone 6 (Chard Area - 34%). For Zone 7 it was Bridport (Beaminster Area - 29%) and for Zone 9 it was Street (Glastonbury Area - 31%).

Table 4.6 Non-Food Shopping (main destinations named by respondents)

Destination	% Market Share in each Area		
	South Somerset Core Zones[3] (1-6)	Outer Zones[4] (7-9)	Total
Yeovil	48.6	28.1	42.9
Chard	2.4	0.2	1.8
Crewkerne	1.8	0.4	1.4
Dorchester	0.2	5.4	1.7
Exeter	1.8	1.3	1.6
Ilminster	2.0	0.0	1.5
Langport	0.7	0.0	0.5
Somerton	0.4	0.0	0.3
Taunton	13.7	3.9	11.0
Street	2.0	14.6	5.5
Sherborne	0.7	7.5	2.6
Gillingham	3.0	0.0	2.2
Bridport	0.0	7.2	2.0
Wincanton	2.7	0.8	1.9
Bath	1.9	1.7	1.8
Clarks FOV, Street	1.2	2.8	1.6
Castle Cary	0.3	3.3	1.1
Shaftesbury	1.5	0.0	1.1

Source: NEMS Household Survey, February 2017 (Question 8)

4.44 The survey results indicate that Yeovil is the main comparison shopping destination in the District in terms of market share, and accounts for almost half of the comparison goods expenditure. Taunton is the next most important comparison shopping destination, particularly for the west of the District. Street to the north and Bridport to the south are also important destinations albeit it is acknowledged that Clarks Village is the main attraction in Street as

[3] Core Zones – Zone 1 (Yeovil Area), Zone 2 (Wincanton Area), Zone 3 (Somerton/Langport Area), Zone 4 (Crewkerne Area), Zone 5 (Ilminster Area), Zone 6 (Chard Area)
[4] Outer Zones – Zone 7 (Beaminster Area), Zone 8 (Sherborne Area), Zone 9 (Glastonbury Area)

opposed to the town centre. In terms of the other centres in the District, the survey results indicate low overall market shares, with no single destination dominating.

4.45 Table 4, Appendix 3 sets out the proportion of comparison goods expenditure within each zone that is spent within South Somerset District. South Somerset District retains between 36% and 80% of comparison goods expenditure within six zones in the District. The highest retention rate (80%) is Zone 1 (Yeovil Area), followed by 75% in Zone 4 (Crewkerne Area) and 63% in both Zones 2 (Wincanton Area) and 3 (Langport/Somerton Area). The lowest retention rates are Zone 5 (Ilminster Area) at 44% and Zone 6 (Chard Area) at 36%, where leakage to Taunton is significant.

4.46 The estimated comparison goods expenditure currently attracted by shopping facilities within South Somerset District is £458.43 million in 2017, as shown in Table 5, Appendix 3. In terms of expenditure, South Somerset retains about 64% of comparison goods expenditure (£374 million in 2017) within the District and 37% within the outer zones (£84 million).

4.47 The average sales density for existing comparison goods sales floorspace within the District is £5,075 per sq. m net as shown in Table 4.7. Table 4.7 indicates that trading levels amongst comparison facilities in South Somerset vary for the main centres.

4.48 Yeovil town centre attracts around 80% of comparison goods trade in Yeovil and the average sales density is reasonable for a centre of its size at £7,193 per sq. m net. However the household survey results will tend to over-estimate the turnover of the town centre and under-estimate the turnover of out of centre stores. A number of respondents mentioned 'Yeovil' as their shopping destination. These have been recorded as "Yeovil town centre", but some of the responses may include out of centre stores in Yeovil. Retail warehouse sales floorspace tends to trade at a lower density than traditional high street shops and this is reflected in the £2,311 per sq. m figure for 'Yeovil Other'.

4.49 The Wincanton sales density is relatively high but is affected by the relatively high proportion of comparison goods sales within large food stores (30% of total comparison goods sales floorspace in Wincanton). The lower sales density figures in the other towns reflect the predominance of small independent outlets, and also household surveys tend to understate the importance of smaller centres.

Table 4.7 Comparison Goods Average Sales Density 2017

Destination	Comparison Turnover 2017 (Millions)	Comparison Sales Floorspace sq. m net	Average Sales Density per sq. m net
Yeovil town centre	£314.16	43,674	£7,193
Yeovil Other	£78.19	33,834	£2,311
Chard	£16.95	3,828	£4,428
Crewkerne	£6.52	3,651	£1,786
Ilminster	£7.68	1,955	£3,928
Wincanton	£8.75	1,847	£4,737
Castle Cary	£6.47	1,315	£4,920
Other S. Somerset	£19.69	3,149	£6,253
District Total/ Average	**£458.43**	**93,253**	**£4,916**

Source: Tables 5 and 10 in Appendix 3.

4.50 Based on Lichfields' recent experience across the country, average sales densities for comparison floorspace can vary significantly. Average sales densities above £7,000 per sq. m net are usually only achieved by relatively large shopping centres. In smaller centres, usually where the property costs are much lower, these high sales densities are not normally achieved. Average sales densities of between £3,000 and £6,000 per sq. m net are generally achieved in medium sized and smaller centres. Based on current trading levels and based on Lichfields' experience of similar retail studies, a figure of £6,000 per sq. m net at 2017 has been applied for new floorspace.

4.51 Overall trading levels are reasonable in the District. Existing floorspace appears to be trading satisfactorily in difficult market conditions. There is no evidence to suggest existing comparison sales floorspace is over-trading, or that there is surplus comparison expenditure available to support new development at present.

Shopping Habits by Age Profile

Convenience Shopping

4.52 In terms of food and grocery shopping, there are no discernible differences as to where households shop. The over 55's are more likely to combine their food shop with other activities including non-food shopping, using services and visiting a café. Those aged under 35 are more likely to combine their food shop with work/business purposes.

4.53 In terms of age profile, respondents 65 years and over are less likely to shop via the internet i.e. 1.2% compared with 4.1% for under 65 years. Older respondents 65 years and over are also less likely to undertake top-up shopping i.e. 63.6% compared with 70.6% for younger respondents.

4.54 Older respondents are seemingly more likely to travel by bus or walk to do their food and grocery shopping. The projected high growth in the over 65 age group up to 2034 will place more emphasis on accessible facilities within walking distance or a short bus ride from their home.

Comparison Shopping

4.55 Respondents were asked where they buy most of their household's non-food shopping. Yeovil was a popular answer for all age groups, ranging between 28% for 25-34 year olds and 53% for 18-24 year olds.

4.56 Those aged 25-54 are more likely to travel to Taunton to undertake non-food shopping. The internet was most popular for those aged 18-24 (14%) and 25-34 (28%). Only 5.5% of over 65's stated they primarily use the internet.

4.57 As with food and grocery shopping, respondents aged 65 years and over are less likely to shop for comparison goods via the internet i.e. 5.5% compared with 12.5% for those aged under 65 years. Older respondents also are more likely to walk or travel by bus to do their comparison shopping.

4.58 As with convenience shopping, the ageing population described in Section 3 may slow the growth of comparison shopping via the internet. Customers should have more free time and there may be more emphasis on accessible shopping within walking distance or a short bus ride. This trend may be offset by increased levels of affluence and computer ownership. The implications of the ageing population are consistent with Experian's growth projections for home shopping, which show a levelling off of growth in home shopping over the next 10 years.

4.59 The propensity of households to purchase certain types of non-food comparison goods varies by age and socio economic groups, as shown in Table 4.8. In general younger and middle aged

respondents are more likely to purchase non-food items in each of the product categories, than the over 65's. However the propensity to purchase products is relatively high in all categories.

Table 4.8 Households Purchasing Comparison Goods by Category

	18 to 44 years	45 to 64 years	65 years and over
Clothing and footwear	100.0	98.2	97.8
Domestic appliances	92.4	92.4	88.1
TV / Hi-Fi / photo / computer	89.1	90.6	81.9
Furniture/ floor coverings / textiles	82.9	84.6	71.8
DIY / hardware / gardening	85.5	90.6	78.9
Health / beauty / chemist	90.0	90.0	87.2
Books / CD's / toys / gifts	95.3	89.1	72.2

Source: NEMS Household Survey, February 2017

4.60 Other observations for shopping for specific goods are as follows:

1 **Clothing and Footwear:** Yeovil was popular for all age groups. Those aged over 35 also often travel to Taunton for this type of shopping. Clarks Village is popular for those aged 25-44. It's notable that those aged 18-24 are also more likely to travel to Bristol for clothes shopping compared to other age groups.

2 **Domestic Electrical/Other Elec:** Sherborne is popular with the over 65's. Yeovil was most popular with those aged 18-24 although alongside Houndstone Retail Park was a popular choice for all age groups. Taunton appeals more to middle-aged shoppers. Those aged under 65 are most likely to use the internet for this type of shopping.

3 **Furniture & Furnishings**: Similar shopping patterns for electricals although notable that 24% of shoppers aged 25-34 choose to travel to Bristol for this type of shopping. Street also tends to be used by the over 55s. The internet is less used for this type of shopping.

4 **Health & Beauty:** Chard was popular for those aged over 25. Over 65s also do this type of shopping at Sherborne and Street. Yeovil was most popular overall but particularly with the under 25s (46%) compared to the over 65s (15%).

5 **CDs / Books:** The internet is primarily used for this type of shopping by those aged 25-34 (73%), 35-44 (49%), 45-54 (48%) and 55-64 (42%). Those aged under 25 primarily used Yeovil (55%) and those aged over 65 are generally less likely to buy these goods but those who did used a number of locations including Yeovil, Sherborne and Taunton.

4.61 The projected high growth in the over 65 age groups up to 2034 is likely to impact on comparison goods expenditure due to the lower propensity to purchase goods as shown in Table 4.8. However this will be counter-balanced by the higher propensity for the over 65 age group to shop locally and in the high street rather than at home. Nevertheless the ageing population suggests cautious expenditure growth rates should be adopted.

4.62 Respondents were asked what would make them shop more in Yeovil. Around 61% of the over 65s stated 'nothing' would make them shop more often, implying this age group is broadly content.

4.63 Those aged 18-24 want to see a better choice of clothing shops (20%). All age groups appear to want a better choice of shops generally although responses were particularly high for those aged 25-44. 25-44 year olds also cited better quality of shops, cheaper parking and more car parking as important.

Future Retail Potential

4.64 This section provides an update on the future retail requirement for South Somerset. It should be noted that these figures differ from the 2010 retail study (which informed the adopted Local Plan) for a number of reasons including amendments to the extent of the study area, population change, economic outlook and changes in Experian's expenditure projections. Consequently, the figures are not directly comparable.

Capacity for Future Convenience Goods Floorspace

4.65 The future level of available convenience goods expenditure at 2019, 2024, 2029 and 2034 is shown at Tables 6 to 9, Appendix 2. The total level of convenience goods expenditure available for shops in the District between 2017 and 2034 is summarised in Table 11, Appendix 2. Convenience expenditure available to shopping facilities in the District is expected to increase from £367.29 million in 2017 to £392.48 million in 2034.

4.66 Table 12 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is an available expenditure surplus of £24.32 million convenience goods expenditure at 2017. This surplus will reduce slightly to £23.48 million in 2019, due to a small reduction in expenditure per capita and growth in special forms of trading. Future growth (primarily population growth) will increase the surplus to £31.29 million in 2024 and to £40.56 million in 2031, and then to £49.50 million in 2034.

4.67 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £11,394 per sq. m, the average turnover density of the main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose – the sales density figures are shown in Table 10 in Appendix 2) because new floorspace is likely to be provided by these main operators rather than small independent convenience shops.

4.68 There is a projected expenditure deficit in Ilminster and therefore a negative floorspace requirement is indicated over the plan period. In the other main settlements, surplus convenience goods expenditure could support a small amount of additional floorspace in line with population growth. The figures are summarised in Table 4.9.

Table 4.9: Summary of Convenience Goods Floorspace Projections (sq. m gross)

Location	By 2024	By 2029	By 2034
Yeovil	14	555	1,078
Chard	152	319	478
Crewkerne	504	584	661
Ilminster	-573	-516	-461
Langport	778	827	874
Somerton	278	305	331
Wincanton	1,740	1,884	2,022
Castle Cary	712	737	761
Martock	262	278	294
Ilchester	14	15	16
Other South Somerset	627	98	153
Total	**3,923**	**5,085**	**6,206**

Source: Table 12 in Appendix 2.

Capacity for Future Comparison Goods Floorspace

4.69 The household survey suggests that the District's retention of comparison goods expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in nearby authorities, in particular Taunton and customers' propensity to shop at a variety of locations for these types of goods.

4.70 Future improvements to comparison retail provision within the District could help to increase market shares within the study area. However emerging major developments in neighbouring authorities[5] will limit the ability of shopping facilities in the District to increase their market share of expenditure significantly. Some retail development will be necessary in South Somerset in order to maintain existing market share in the future. Town centre strategies could focus on maintaining market shares in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

4.71 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2017 (i.e. satisfactory levels). Table 11, Appendix 3 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian (Retail Planner Briefing Note 14 – November 2016). Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spend growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. The projected turnover of existing floorspace is subtracted from the expenditure projections to provide an estimate of surplus expenditure available to support new floorspace.

4.72 Due to low expenditure projections in the short term, growth in comparison goods expenditure will be offset by increases in turnover density up to 2019, but by 2024 there is a comparison expenditure surplus of £34.83 million. By 2029, future growth generates an expenditure surplus of £90.58 million, which will grow to £158.61 million by 2034.

4.73 The comparison goods expenditure surplus is converted into net comparison sales floorspace projections at Table 12, Appendix 3, adopting an average sales density of £6,000 per sq. m net in 2017, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2024 (£34.83 million) could support 6,738 sq. m gross of sales floorspace and by 2034 the surplus expenditure could support 25,173 sq. m gross. The figures are summarised in Table 4.10 overleaf.

[5] West Dorset District Councils have ambitions of bringing forward a number of retail schemes in Dorchester such as Charles Street, Trinity Street, Fairfield Road, Wollaston Fields and Top O' Town. Please refer to GL Hearn Report on Dorchester Town Centre's Development Potential. https://www.dorsetforyou.gov.uk/media/216406/Development-of-Dorchesters-Centre/pdf/Development_of_Dorchesters_Centre.pdf Accessed 18-7-17

Table 4.10: Summary of Comparison Goods Floorspace Projections (sq. m gross)

Location	By 2024	By 2029	By 2034
Yeovil	5,755	13,561	21,508
Chard	264	616	974
Crewkerne	94	223	354
Ilminster	112	265	421
Langport	25	60	95
Somerton	62	146	232
Wincanton	129	304	481
Castle Cary	97	228	361
Martock	63	150	238
Other South Somerset	136	320	509
Total	**6,738**	**15,871**	**25,173**

Source: Table 14 in Appendix 3.

The Retail Study Update 2010

4.74 The Retail Study update prepared for South Somerset in 2009 provided retail floorspace capacity projections up to 2026. The convenience goods floorspace scenario 1 projection for the District was 6,028 sq. m net by 2026 (around 8,600 sq. m gross). The update to this projection in November 2010 suggested a slightly lower figure of 5,819 sq. m net. The revised projections in this report suggest a much lower figure of around 3,600 sq. m net (5,085 sq. m gross) at 2029. The main reason for this reduction is Experian's lower convenience goods expenditure forecasts.

4.75 The comparison goods floorspace scenario 1 projection for the District was 16,798 sq. m net by 2026 (around 22,400 sq. m gross). The update to this projection in November 2010 suggested a lower figure of 13,805 sq. m net. The revised projections in this report suggest a much lower figure of around 7,800 sq. m net (10,400 sq. m gross) at 2026. The main reasons for this reduction are Experian's lower comparison goods expenditure forecasts (due to the effects of the recession), higher estimates for home shopping and higher growth in turnover efficiency for existing floorspace.

Qualitative Need for Retail Floorspace

4.76 The section above quantifies the theoretical capacity to support new retail floorspace within South Somerset, based on the population and expenditure projections. The qualitative need for retail facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:

- the diversity of uses and deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- levels of expenditure retention and leakage;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Existing Retail Provision in South Somerset District

4.77 As part of the study an audit of the existing retail and service provision in the main centres was undertaken in February 2017. These assessments are detailed in Appendix 5 and a summary of existing retail provision in provided in Table 4.11.

4.78 Yeovil is the largest shopping destination within the District with a combined retail sales floorspace of over 94,000 sq. m net. These floorspace figures include out of centre food stores and retail warehouses in addition to facilities within the defined town centres.

4.79 Yeovil accounts for nearly 74% of the retail sales floorspace within the District. However nearly 45% of floorspace in Yeovil is outside the town centre, including the Peel Centre (Babylon Hill) outside the District boundary. The amount of floorspace outside of the defined centres has raised concern relating to the impact on the health of the town centre and investment. The Peel Centre (Babylon Hill) lies outside the boundary of South Somerset, and the Council has not been in a position to control applications to vary conditions for new retailers to take occupation of large retail units. Further proposals at the Peel Centre (Babylon Hill) should be required to comply with the impact and sequential tests.

Table 4.11 Local Plan Retail Hierarchy

Centre	Retail Hierarchy	Town Centre Class A1-A5 Units	Convenience Floorspace sq. m net	Comparison Floorspace* sq. m net	Total Retail Floorspace sq. m net
Yeovil town centre	Principal Centre	373	8,435	43,674	52,109
Yeovil other	n/a	n/a	8,783	33,834	42,617
Chard	Market Town	120	4,749	3,651	8,400
Crewkerne	Market Town	98	2,374	3,651	6,025
Ilminster	Market Town	69	2,459	1,955	4,414
Wincanton	Market Town	74	3,360	1,847	5,207
Somerton	District Centre	74	951	1,334	2,285
Castle Cary	District Centre	69	376	1,315	1,691
Langport	District Centre	51	1,026	671	1,697
Martock	Local Centre	19	490	214	704
Other South Somerset	Local Centres	81	1,867	930	2,797
Total		**1,044**	**34,870**	**93,253**	**128,123**

Source: Yeovil Goad Plan Data, SSDC Land Use Survey, VOA Data and Lichfield Survey

* includes comparison sales in food stores.

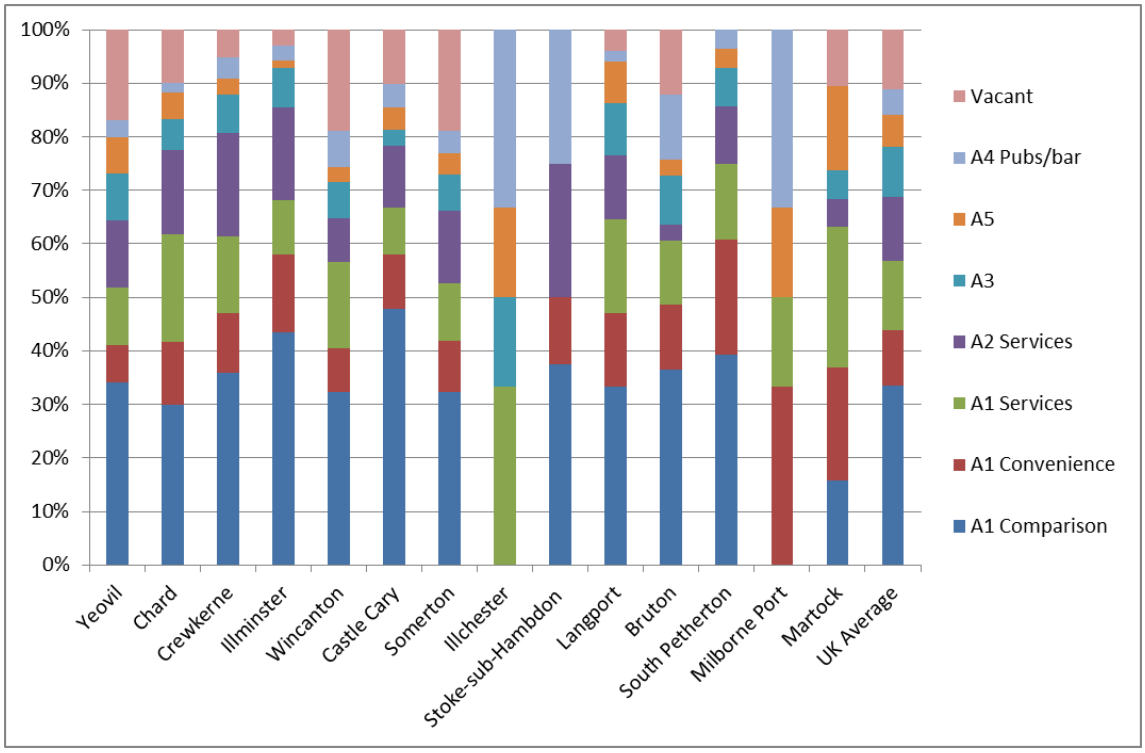
4.80 The next largest destination is Chard at 8,400 sq. m net, which includes a large out-of-centre Tesco food store. Crewkerne is the next largest centre with 6,025 sq. m net, followed by Wincanton (5,207 sq. m net) and Ilminster (4,414 sq. m net). The remaining centres are smaller in terms of retail sales floorspace (less than 2,300 sq. m net), which is consistent with their designations as District/Local Centres.

4.81 Figure 4.2 shows the proportional mix of Class A within the 14 defined centres (excluding out of centre food stores and retail warehouses). The mix of Class A units has been compared with Goad Plan national average based on recent land use surveys for over 1,250 town centres across the UK. It should be noted that the Goad national average is based on a full range of large, medium and small centres throughout the UK. Smaller centres tend to have a lower proportion of Class A1 comparison shops than larger centres, and conversely a higher proportion of convenience retailing and non-retail services. Nevertheless the comparison with the national average data provides a useful benchmark.

4.82 The mix of uses in most centres is broadly consistent with the Goad national average, with the exception of the small centres at Ilchester and Milborne Port where there are no comparison shops. Martock also has a significantly below average provision of comparison shops (around 16%). Ilminster and Castle Cary have a particularly strong comparison goods offer due to the reasonable number of independent specialists for centres of their size.

4.83 The vacancy rate is lower than the national average in most centres, apart from Yeovil which has a vacancy rate of 16.9% and Wincanton and Somerton which have particularly high vacancy rates (around 19%). Bruton also has a slightly higher than average vacancy rate. The provision of food and drink (Class A3) units is particularly strong in Ilchester. Ilchester and Milborne Port have a significantly higher than average provision of drinking establishments and hot food takeaway (Class A4 and A5) units although the total number of units is very low. A more detailed audit of the town centres is contained within Appendix 5.

Figure 4.2 Mix of Class A Uses in South Somerset's Main Centres



Source: Yeovil Goad Plan, SSDC land use survey and Lichfields surveys

Convenience Goods Shopping

4.84 Most households undertake two types of food and grocery shopping trips i.e. a weekly shop (or less frequent main or bulk shopping trip) and more regular top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk

food shopping trips and large supermarkets or superstores are the usual destinations. Accessibility and convenience tend to be more important for top up shopping trips.

4.85 **Yeovil** and **Ilchester** are located in **Zone 1 (Yeovil Area)**. Convenience shopping provision in Yeovil town centre is below the Goad national average in terms of the proportion of shop units; however Yeovil has a number of large out of centre supermarkets. The town centre includes a Tesco Extra (7,713 sq. m net), M&S foodhall (840 sq. m), Iceland (290 sq. m), two Lidl stores (1,206 sq.m net and 1,583 sq.m net respectively) and several smaller operators. A Farmfoods store (697 sq. m) is situated just outside the town centre boundary, along with an out of centre Asda, Morrison's and Lidl. Floorspace figures are provided by the Storepoint 2017 Database. In terms of convenience goods expenditure retention, Yeovil retains 92% within Zone 1 (Yeovil Area). The majority of the expenditure leakage from Zone 1 (2.4%) is attracted to food stores in Sherborne (Zone 8) due to easy access along the A30 and B3148.

4.86 Based on the choice of food stores, mix of uses and high expenditure retention, Zone 1 (Yeovil Area) is well served in terms of convenience goods shopping provision.

4.87 **Wincanton, Castle Cary** and **Bruton** are located in **Zone 2 (Wincanton Area)**. Gillingham is also within Zone 2 (Wincanton Area) but located outside of South Somerset District Council's jurisdiction. Convenience shopping provision in Wincanton is slightly below the Goad national average and within the town centre itself, there is a Coop (365 sq. m net) and a number of other smaller convenience shops. The main convenience retail provision is out of centre, comprising Morrison's (2,494 sq. m net) and Lidl (669 sq. m net). Castle Cary has a small Co-op store and Bruton has a small Budgens.

4.88 In terms of convenience goods expenditure retention, Wincanton and Castle Cary retain around 49% in Zone 2 (Wincanton Area) and Gillingham retains 28%. The overall expenditure retention in Zone 2 (Wincanton Area) is relatively high at around 78%. The majority of the expenditure leakage from Zone 2 (Wincanton Area) is attracted to food stores in Shepton Mallet (4.8%) which is located beyond the study area to the north and Sherborne (3.2%) which is located in Zone 8 (Sherborne Area) to the south.

4.89 Based on the choice of food stores and high expenditure retention, Zone 2 (Wincanton Area) is well served in terms of convenience goods shopping provision.

4.90 **Langport, Somerton** and **Martock** are located in **Zone 3 (Somerton/Langport Area)**. Langport has a small supermarket, supported by a number of butchers and other food shops. A larger supermarket, Tesco Metro (850 sq. m net), is located on the edge of the centre. In Somerton, the food and grocery offer is limited to smaller shops plus a Williams Supermarket (689 sq. m net). Martock has a small Co-op store.

4.91 Collectively, Langport, Somerton and Martock retain a reasonable proportion (48%) of convenience goods expenditure in Zone 3 (Somerton/Langport Area). Most of the expenditure leakage is attracted to large food stores in Yeovil to the south (22%) and Street/Glastonbury (18%) in Zone 9 (Glastonbury Area) to the north.

4.92 The provision of convenience goods shopping within the small settlements in Zone 3 (Somerton/Langport Area) is consistent with the nature and role of these centres. Residents therefore look to larger stores in Yeovil and Street to meet their main bulk food shopping needs.

4.93 **Crewkerne, South Petherton** and **Stoke sub Hamdon** are located in **Zone 4** (Crewkerne Area). Convenience shopping provision in Crewkerne is above the Goad national average in terms of the proportion of shop units and it retains a reasonable proportion (over 35%) of convenience goods expenditure in Zone 4 (Crewkerne Area). Other local shopping in Zone 4

(Crewkerne Area) retains over 24%, and the overall retention rate is circa 60%. Most of the expenditure leakage is attracted to large food stores in Yeovil (Zone 1) to the east.

4.94 Within Crewkerne the largest food stores are Waitrose (1,572 sq. m net) and Lidl (707 sq. m net) and a number of other smaller convenience shops. The Budgens store closed recently. South Petherton and Stoke-sub-Hamdon each have small Co-op stores. Zone 4 (Crewkerne Area) is well served in terms of convenience goods shopping provision.

4.95 **Ilminster** is located in **Zone 5**. Convenience shopping provision in Ilminster is above the Goad national average in terms of the proportion of shop units. The centre has a Tesco store (1,624 sq. m net) and a Coop store (605 sq. m net). These main stores are supported by a McColl's convenience store and other smaller convenience shops. Ilminster retains a reasonable proportion (41%) of convenience goods expenditure in Zone 5 (Ilminster Area). Most of the leakage from Zone 5 (Ilminster Area) is attracted to food stores in nearby towns to the west and east i.e. Taunton (16%), Chard (11%), Yeovil (9%) and Crewkerne (8%). Zone 5 (Ilminster Area) is well served in terms of access to convenience goods shopping provision.

4.96 **Chard** is located in **Zone 6**. Convenience shopping provision in Chard is above the Goad national average in terms of the proportion of shop units. The main food store is the edge-of-centre Tesco supermarket (1,854 sq. m net). The town centre has a number of other food stores including, Lidl (871 sq. m net), Sainsbury's (996 sq. m net) and a number of other smaller convenience shops. A Coop store in Chard (828 sq. m net) has recently ceased trading. Chard retains a high proportion (86%) of convenience goods expenditure in Zone 6 (Chard area). The town is well served in terms of convenience goods shopping provision.

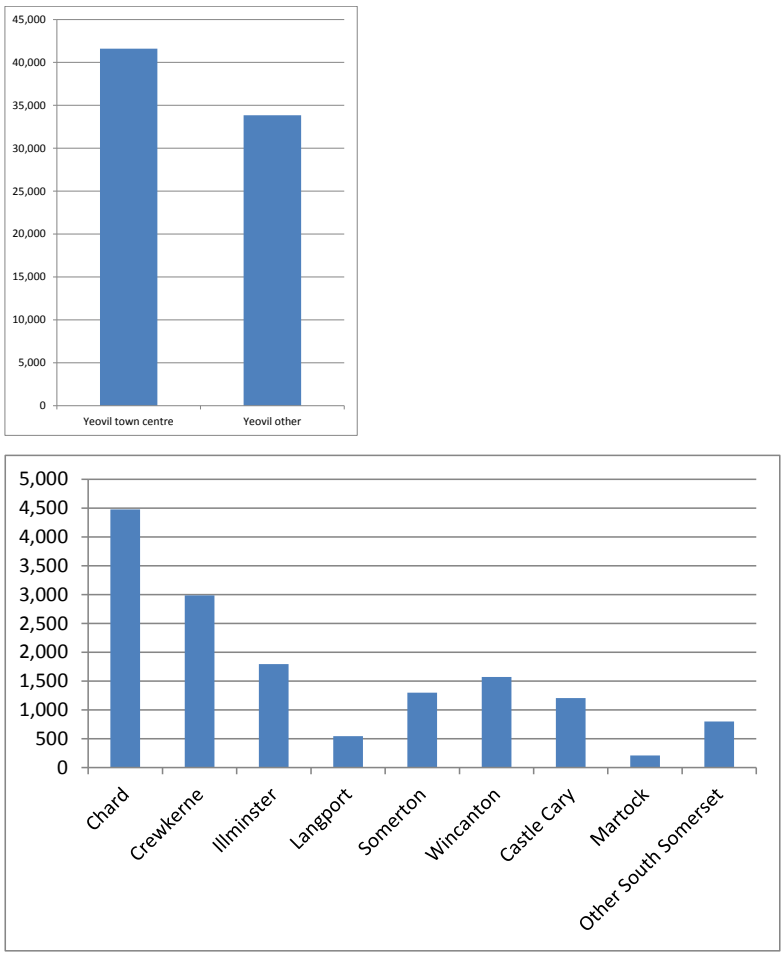
4.97 In summary, food store and convenience retail provision is strong across the six zones. Large food stores (over 1,000 sq. m net) suitable for main and bulk food shopping are focused in the principal and market towns i.e. Yeovil, Chard, Crewkerne, Ilminster and Wincanton. These stores provide a good distribution of facilities accessible from all parts of the District. The smaller district and local centres provide a number of small food stores suitable for basket and top up shopping.

4.98 There are no clear identified areas of qualitative deficiency in food store provision within the District albeit Zones 3 (Somerton/Langport Area) and 5 (Ilminster Area) does not have a deep discounter such as Aldi or Lidl.

Comparison Shopping

4.99 Within the 14 designated centres in South Somerset, there are 357 comparison shops which provide a total comparison goods sales floorspace of around 93,000 sq. m net. Figure 4.3 indicates that Yeovil is the main comparison shopping centre in South Somerset, and provides a good range and choice of comparison goods shopping facilities.

Figure 4.3 Comparison Goods Retail Sales Floorspace in South Somerset (sq. m net)



4.100 As shown in Figure 4.2, the proportion of Class A1 comparison good shops in most of the town centres is comparable or above the Goad national average. The exception to this is Ilchester, Milborne Port and Martock. Ilminster and Castle Cary have a particularly strong comparison goods offer due to the large number of independent traders.

4.101 The comparison goods retail offer is predominantly small (less than 100 sq. m net) independent specialist traders, particularly within the smaller centres. There is a much larger selection of multiple comparison retailers in Yeovil. Multiple outlets within the smaller centres are primarily charity shops.

4.102 South Somerset District has a reasonable provision of retail warehouses. There are two main retail parks in the District which are both located in Yeovil (Houndstone Retail Park and Lysander Road Retail Park). National multiple retailers trading in these locations include Mothercare (relocated from the Town Centre), B&M Bargains, 99p Store and Hobbycraft. Retail warehouses can also be found at Lynx Trading Estate (Wickes, Toolstation and Screwfix) and along Lyde Road (Booker Wholesale).

4.103 However, the out of centre retail park known as The Peel Centre (located just to the east of Yeovil town centre), is also considered to serve the Yeovil catchment despite its location within the district of West Dorset.

4.104 The cumulative impact of the development at the Peel Centre and other out of centre sites on the town centre has raised concerns, in particular the effect of this leakage, diversion of trade and footfall on operator demand and investor confidence in Yeovil Town Centre. If unchecked the

cumulative impact of additional development could result in a significant adverse impact on the overall vitality and viability of Yeovil Town Centre, and could jeopardise both planned public and private investment in the centre and specifically the plans by Benson Elliot to extend the Quedam Centre in the heart of the town. The Council's concern about the impact of Babylon Hill on Yeovil Town Centre and its vitality and viability has been expressed in the joint duty-to-cooperate between South Somerset District Council and West Dorset District Council.

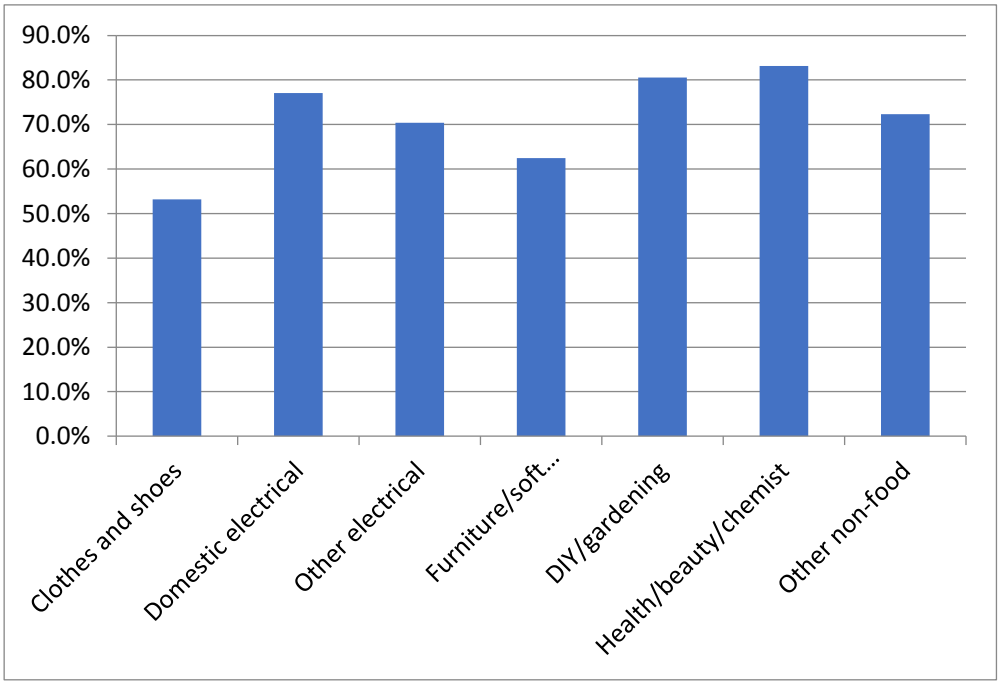
4.105 South Somerset District Council's approach has been to consider future out-of-centre proposals with care, as there is the potential to harm opportunities for town centre investment, redevelopment and expansion.

4.106 B&Q and Homebase are the main DIY stores in the District. The furniture/soft furnishing sector is represented by Allied Carpets, Oak Furnitureland, Harveys and Carpet Right. The electrical sector is represented by Maplin, PC World and Currys. Other outlets include Halfords, Argos, Boots, Next, Home Bargains, Mothercare and TK Maxx.

4.107 The NEMS household survey (February 2017) asked respondents where they shop for a range of comparison goods. The results indicate that South Somerset District retains a relatively high market share of DIY/hardware expenditure and electrical goods, furniture, soft furnishings and floor-covering expenditure. These results reflect the choice of retail warehouses in Yeovil.

4.108 The household survey results suggest South Somerset retains 64% of comparison goods expenditure within the core zones[6] (Zones 1 to 6), which include all parts of the District. Based on Lichfields' experience, this level of retention is typical of a rural district where the catchment areas of sub-regional centres overlap. A breakdown of expenditure retention is shown in Figure 4.4.

Figure 4.4 Comparison Goods Expenditure Retention in Core Zones 1-6



Source: NEMS Household Survey (last shopping destination for comparison goods)

[6] Core Zones – Zone 1 (Yeovil Area), Zone 2 (Wincanton Area), Zone 3 (Somerton/Langport Area), Zone 4 (Crewkerne Area), Zone 5 (Ilminster Area), Zone 6 (Chard Area)

4.109 The results show South Somerset has a reasonably high level of expenditure retention for most product categories, but a lower retention for clothing and footwear. Clothing and footwear are generally higher order comparison goods that tend to be bought on an occasional basis, where customers are most likely to shop around and compare products in different outlets. Whilst Yeovil is the main destination for these types of shopping trips, other nearby centres, such as Taunton, are big attractors. Customers are usually prepared to travel further to purchase these items and would not expect to find a wide choice within smaller local centres. A detailed breakdown of comparison goods expenditure patterns by each goods category is set out in Appendix 7.

4.110 **Yeovil** is located in **Zone 1 (Yeovil Area)** but the household survey results confirm the town serves customers across all 9 study area zones. There are 127 Class A1 comparison units within the town centre (33.8%) which is comparable with the national average (source – Goad). These shops, along with out of centre retail warehouses in Yeovil and comparison floorspace in food stores, provide over 77,500 sq. m net of comparison goods sales area. In terms of comparison goods expenditure retention, Yeovil retains nearly 78% in Zone 1 (Yeovil Area). There is some cross flow of expenditure to Taunton and other centres outside of South Somerset, but this reflects overlapping catchment areas rather than a deficiency in retail provision in Yeovil. Based on Lichfields' experience this level of retention is relatively high and reflects Yeovil's role as the principal centre within the District.

4.111 **Wincanton, Castle Cary** and **Bruton** are located in **Zone 2 (Wincanton Area)**. Gillingham is also located in Zone 2 (Wincanton Area) but is located outside of SSDC's jurisdiction. The proportion of Class A1 comparison units (24%) within Wincanton town centre is slightly below the national average. Wincanton has around 1,800 sq. m net of comparison floorspace (source - VOA). Collectively shopping facilities in Zone 2 (Wincanton Area) (including Gillingham) retain about 17% of comparison goods expenditure within Zone 2 (Wincanton Area).

4.112 The majority of the expenditure leakage from Zone 2 is attracted to Yeovil (54%), Sherborne (4%) and Shepton Mallet (4%). The natural catchment areas of these towns extend into Zone 2 (Wincanton Area), and Yeovil's role as a principal centre adequately serves this area.

4.113 **Langport, Somerton** and **Martock** are located in **Zone 3 (Somerton/Langport Area)**. These settlements have small centres with a limited number of comparison shops. The combined total comparison goods sales floorspace is about 2,200 sq. m net. These towns retain around 11% of comparison goods expenditure within Zone 3 (Somerton/Langport Area). There is a large flow of expenditure to Yeovil (50%) and some leakage of expenditure to locations outside of the District, in particular to Street/Glastonbury (15%) and Taunton (11%).

4.114 **Crewkerne, South Petherton** and **Stoke sub Hamdon** are located in Zone 4 (Crewkerne Area). Crewkerne is the largest centre and has 35 comparison units. The total comparison goods sales floorspace in Crewkerne is circa 4,100 sq. m net. Crewkerne retains less than 5% of comparison goods expenditure within Zone 4 (Crewkerne Area). Yeovil attracts 63%, but there is leakage of expenditure to locations outside the District, particularly Taunton (9%). Yeovil's role as a principal centre adequately serves this area.

4.115 **Ilminster** is located in Zone 5 (Ilminster Area). The proportion of Class A1 comparison shops within Ilminster (43.5%) is significantly above the national average. These shops, along with comparison floorspace in food stores, provide around 1,900 sq. m net of comparison floorspace. Ilminster retains 10% of comparison goods expenditure within Zone 5 (Ilminster Area). Yeovil attracts around 26% of expenditure within Zone 5 (Ilminster Area). A significant amount of expenditure leaks from Zone 5 (Ilminster Area) to locations outside the District, primarily

Taunton (40%). Yeovil's role as a principal centre adequately serves this area, supported by Taunton to the west.

4.116 **Chard** is located in Zone 6 (Chard Area). The proportion of Class A1 comparison units within the town centre (30%) is below the national average. These shops along with comparison floorspace in food stores provide around 3,800 sq. m net of comparison floorspace. Chard retains over 21% of comparison goods expenditure within Zone 6 (Chard Area). Yeovil attracts around 13% of expenditure within Zone 6 (Chard Area). A significant amount of expenditure leaks from Zone 6 (Chard Area) to locations outside the District, primarily Taunton (48%). Taunton's role as a principal centre adequately serves this area.

4.117 In summary, comparison goods retail provision is reasonably strong within the District, but is primarily concentrated in Yeovil and to a lesser extent Chard and Crewkerne. The clothing and footwear offer is considered to be weak in the District, as demonstrated by the higher level of expenditure leakage for these types of goods.

4.118 Residents within the District have access to Yeovil for higher order comparison goods shopping. Yeovil is reasonably accessible from most parts of the District; however residents to the west of the District evidently have easier access to Taunton. Despite this, South Somerset retains a sustainable market share of comparison goods expenditure (ranging between 43% and 80% per Core Zone). The exception to this is Zone 6 (Chard Area) which predominantly falls within the catchment area of Taunton.

4.119 Given the scale, quality and range of shopping facilities available in Taunton, the proportion of comparison expenditure spent outside the District is likely to remain high, particularly in the west of the District. Investment will be needed in the District in order to retain existing levels of comparison goods expenditure. The objective of the development strategy for South Somerset should be to maintain the District's shopping role and market share within the sub-region, in the face of increasing competition. The economic projections in this section assume that new development will retain the District's share of comparison expenditure in the study area and will help to maintain this share in the future.

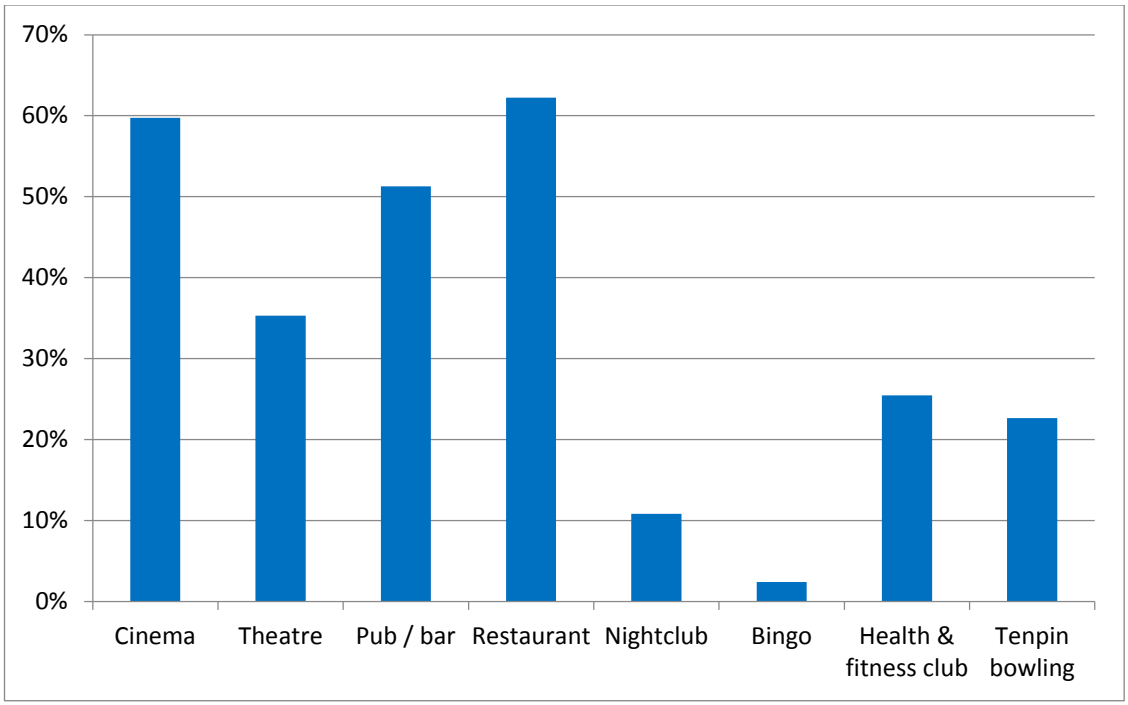
5.0 Requirements for Other Town Centre Uses

Introduction

5.1 This section assesses the potential for commercial leisure and town centre uses in South Somerset District, including theatres, cinemas, ten pin bowling, bingo, health and fitness and restaurants/cafes and pubs/bars.

5.2 Household survey respondents were asked about their family's leisure activities. The participation rates within the study area are shown in Figure 5.1. and an assessment of these sectors is set out in this section.

Figure 5.1 Leisure Participation (% of Households)



Source: NEMS Household Survey, February 2017

5.3 The household survey identifies that visiting restaurants (62%) is the most popular leisure activity within the District, closely followed by visiting cinemas (60%), pubs/bars (51%) and theatres (35%).

5.4 Table 5.1 sets out leisure participation rates by different age groups. There are some notable differences e.g. cinema usage is much more prevalent for those aged under 55 and only those aged under 34 tending to use nightclubs. The use of restaurants, pubs, theatres and bingo halls are broadly similar for all ages. The use of health and fitness clubs and ten pin bowling alleys drops amongst older groups.

Table 5.1 Leisure Activity Usage by Age

Activity	Age					
	18-24	25-34	35-44	45-54	55-64	65+
Cinema	84.7%	79.8%	72.9%	61.9%	46.1%	36.1%
Theatre	31.9%	37.7%	38.4%	42.9%	36.7%	28.7%
Pub / bar	68.6%	41.2%	50.1%	55.2%	52.2%	43.3%
Restaurant	67.6%	66.0%	65.8%	66.3%	65.4%	51.8%
Nightclub	52.3%	20.6%	2.8%	3.5%	0.5%	1.3%
Bingo	0.0%	5.0%	2.4%	3.6%	2.5%	2.3%
Health & fitness club	47.0%	37.8%	30.2%	22.7%	19.9%	10.2%
Tenpin bowling	37.4%	46.9%	35.7%	25.2%	8.6%	2.2%
(None of these)	0.0%	20.4%	12.6%	8.6%	12.3%	24.0%

Source: Household Survey (Question 29)

Commercial Leisure Uses

5.5 Residents in South Somerset District have good access to a range of commercial leisure and entertainment facilities within the District and in the surrounding area, in particular Yeo Leisure Park in Yeovil, which has a cinema, bowling alley and gym, and Taunton and Dorchester outside of the District.

5.6 Based on Lichfields' experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from clustering together for example on out of centre leisure parks.

Cinemas

5.7 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2015 were 171.9 million. Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The 2015 national average was 2.64 trips per person per annum.

5.8 The Cinema Advertising Association identities 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, in order to identify areas of under and over-provision. The latest (2015) national average is about 42,000 cinema trips per screen per annum or 215 trips per seat per annum.

5.9 Residents in South Somerset District and the wider study area have limited choice of cinemas, with only a Cineworld at Yeo Leisure Park, Yeovil providing 10 screens and 1,900 seats.

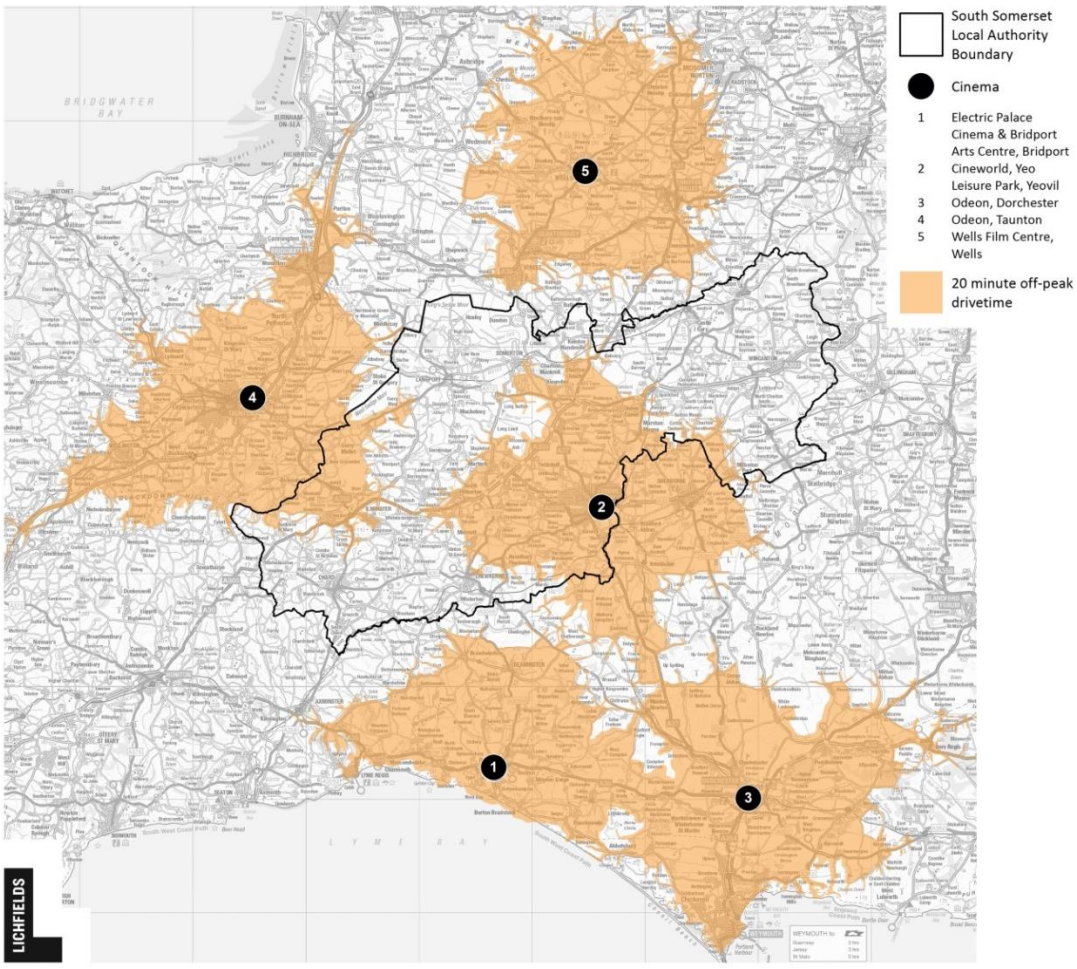
5.10 The cinema is however complemented by a cinema touring company, Moviola, which offers a rural cinema service. Moviola shows films in town halls, village halls, theatres and schools across South Somerset. This service is small and does not offer the choice of films shown at large multiplex cinemas. There are also two independent cinemas in Bridport (which is located outside the study area), the Electric Palace and the Bridport Arts Centre. These attract residents

from Zone 7 (Beaminster Area). Other cinema destinations are the Odeon in Dorchester and the Odeon in Taunton.

5.11 The survey results indicate that 60% of households within the study area visit the cinema (40% do not participate in this activity). The main destinations visited by participating households are set out in Table 5.2 below. After the Cineworld in Yeovil, the most popular cinema is the Odeon at Dorchester and the Odeon at Taunton which attracted 15% and 11% of cinema trips across the study area respectively. The Dorchester Odeon attracts 20% of cinema trips from Zone 1 (Yeovil Area). This is surprising as Dorchester is nearly 20 miles from Zone 1 (Yeovil Area).

5.12 In addition, 20 minute drive times from the most popular cinema destinations have been mapped at figure 5.2 below. This shows that as a local authority area, South Somerset is relatively well catered for in terms of cinema provision. Areas of deficiency appear to be towards the east, south west and parts of the north of the District. Settlements in these areas include Chard, Wincanton, Langport and Somerton although most of these settlements are not that far away from being within 20 minutes of a cinema. The Cineworld in Yeovil caters for the central part of South Somerset. The cinemas that lie outside the South Somerset boundary do not appear to be accessible within 20 minutes of South Somerset with the exception of the Odeon in Taunton which is within 20 minutes of areas in the west of the District, including Ilminster.

Figure 5.2 20 minute off peak drive time



Source: Lichfields Analysis

5.13 The Cineworld in Yeovil attracts 67% of cinema trips from the study zones. There is a leakage of cinema trips outside the study area to Dorchester (15%) and Taunton (11%). In total, the South Somerset District market share of cinema trips in the study area as a whole is 68%.

Table 5.2Main Cinema Trip Destinations

Destinations	% Market Share in each Zones									
	Zone 1 Yeovil	Zone 2 Wincanton	Zone 3 Somerton	Zone 4 Crewkerne	Zone 5 Ilminster	Zone 6 Chard	Zone 7 Beaminster	Zone 8 Sherborne	Zone 9 Glastonbury	Study Area Total
Yeovil	79	78	79	78	45	20	24	74	63	**67**
Dorchester	20	11	0	10	0	9	67	26	0	**15**
Taunton	0.3	0	14	6	52	64	0	0	12	**11**
Street/ Glastonbury	0.3	0	3	0	0	0	0	0	14	**2**
Wells	0	0	0	0	0	0	0	0	9	**1**

Source: NEMS Household Survey, February 2017

5.14 The study area population in 2017 (256,720 people) will generate 677,700 cinema trips per annum, based on the national average visitation rate (2.64 trips per annum). As indicated above, South Somerset District retains 67% of the cinema trips generated within the study area i.e. about 454,100 trips. Based on the national average of 215 trips per seat 454,100 trips would support 2,112 cinema seats, compared with the existing provision of 1,900 seats. This suggests a current shortfall of 212 seats.

5.15 By 2034 the study area population will generate 739,100 cinema trips, or 495,200 trips (67% of the total in the study area) retained within South Somerset District. Based on the national average, these cinema trips could support 2,303, compared with the existing provision of 1,900 seats. The surplus potential at 2034 is 403 seats.

5.16 These projections suggest that there is theoretical capacity for a small boutique cinema (up to 5 screens) in South Somerset District over the plan period. Curzon and Everyman are art house cinema operators who have expanded in recent years. The latter has cinemas in Bath, Exeter and Southampton. Curzon has cinemas in Canterbury, Ripon and Sheffield with a new facility proposed in Colchester. The South Somerset area may be able to attract such an operator.

Theatres

5.17 In total, 35% of respondents to the household survey indicated that they visit the theatre. Table 5.3 summarises where respondents stated that they had last visited the Theatre. The above results demonstrate that Yeovil is the main theatre destination in South Somerset District, attracting just over 50% of the theatre trips within the study area.

Table 5.3 Main Theatre Trip Destinations

Destination of Last Trip	% of Participating Households
Yeovil	50.3
Central London/West End	12.7
Bristol	11.9
Street	7.4
Bath	5.6

Source: NEMS Household Survey, February 2017

5.18 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UK Theatres membership).

5.19 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, the South Somerset study area population in 2017 (256,720 people) generates 128,360 theatre trips per annum. The household survey results suggest over half of these trips (about 64,000 trips) will be attracted to South Somerset District. These figures suggest the Octagon, Westlands and Swan theatres in Yeovil provide adequate provision. There is no clear need for additional theatre provision in South Somerset District in the plan period.

Private Health and Fitness Clubs

5.20 The 2016 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. It has more clubs, more members and a greater market value than ever before. The 2016 report highlighted that the industry experienced growth over the twelve month period to the end of March 2016, with an increase of 5.3% in the number of memberships.

5.21 In South Somerset, the household survey indicates that 25% of respondents or their families visit health/fitness clubs. Of the participating households, the main destinations mentioned are summarised in Table 5.4.

5.22 South Somerset District attracts about two thirds of health and fitness facilities trips within the study area. The household survey results suggest respondents tend to use local facilities or facilities close to their place of work.

5.23 The Sport England/Active Places data indicates that there are 22 registered health and fitness suites in the District, with 833 fitness stations. Three of these facilities are for private use only (Bruton School for Girls, King's School and Royal Naval Air Station). These private use facilities provide 112 fitness stations in total. The remaining 19 registered facilities open to the general public (including registered members) have 721 fitness stations in total as shown in Table 5.5. The existing health and fitness provision is: Yeovil (461 stations); Chard (94 stations); Wincanton (66 stations); Bruton (54 stations); Crewkerne (39 stations); Ilminster (29 stations); Langport (26 stations); Castle Cary (26 stations); Martock (22 stations) and Stoke-Sub-Hamdon (16 stations).

Table 5.4 Main Health and Fitness Club Destinations

Destination of Last Trip	% of Participating Households
Yeovil	32.3
Wincanton	10.6
Sherborne	9.6
Crewkerne	9.2
Chard	5.9
Gillingham	3.9
Langport	3.5

Source: NEMS Household Survey, February 2017

5.24 The study area population in 2017 (256,720 people) is projected to grow to 267,153 by 2024, and to 279,949 by 2034. Health and fitness facilities in South Somerset District attract about two thirds of respondents, which suggest a catchment population of 171,000 in 2017, 178,000 in 2024 and 187,000 in 2034. This catchment population indicates that South Somerset District has about 4.9 fitness stations per 1,000 people in 2017 (833 stations in total).

Table 5.5 South Somerset District Health and Fitness Clubs (Sport England/Active Places Data, 2016)

Name/Location	Type	No. Fitness Stations
Bruton School for Girls, Bruton	Private Use	14
King's School, Bruton	Private Use	40
Caryford Fitness and Leisure, Castle Cary	Registered Membership use	26
Cresta Leisure Centre, Chard	Pay and Play	29
Cricket St Thomas Leisure Club, Chard	Registered Membership use	25
Phoenix Fitness, Chard	Registered Membership use	40
Crewkerne Aqua Centre, Crewkerne	Pay and Play	39
Ilminster Fitness Centre Ltd, Ilminster	Registered Membership use	29
Huish Leisure Limited, Langport	Pay and Play	26
Fit Martock, Martock	Registered Membership use	22
Stanchester Sports Centre, Stoke-sub-Hamdon	Pay and Play	16
Holbrook House Hotel and Club, Wincanton	Registered Membership use	36
Wincanton Sports Centre, Wincanton	Pay and Play	30
Bucklers Mead Academy, Yeovil	Pay and Play	15
Goldenstones Pools & Leisure Centre, Yeovil	Pay and Play	60
Images Fitness Centre, Yeovil	Registered Membership use	40
Nuffield Health, Yeovil	Registered Membership use	60
Preston Sports Centre, Yeovil	Pay and Play	25
Progress Gym, Yeovil	Registered Membership use	100
Royal Naval Air Station, Yeovilton	Private Use	58
Tone Zone Fitness Centre, Yeovil	Registered Membership use	81
Yeovil College Sports Centre, Yeovil	Pay and Play	22
Total		**833**

Source: Sport England

5.25 The South West of England region has 812 registered health and fitness suites with 31,126 fitness stations (average of 38 stations per suite). This existing provision equates to around 5.8 fitness stations per 1,000 people. South Somerset has a lower provision of fitness stations (4.9 per 1,000 people) than the regional average (5.8 stations), which suggests health and fitness clubs could be trading above average. The existing shortfall is 159 stations (need for 992 stations compared with a supply of 833 stations).

5.26 The study area population is projected to increase by 10,432 people by 2024 and by 23,228 people by 2034. If South Somerset can attract two thirds of this population growth (6,900 people at 2024 and 15,500 people by 2034), in line with the current market share, then this would generate demand for 40 fitness stations by 2024 and 90 fitness stations by 2034, based on the regional average of 5.8 stations per 1,000 people.

5.27 These figures suggest there is scope for 3-5 health and fitness facilities (approximately 50 to 100 stations each) in the District over the plan period. It's notable that those aged over 65 are less likely to use health and fitness facilities (see Table 5.1) and with an aging population the demand for these facilities could potentially decrease in South Somerset. However, with membership increasing year on year it is considered that this will likely counterbalance any decrease experienced.

Ten Pin Bowling

5.28 The household survey results suggest that 23% of households in the study area visit ten pin bowling facilities. The main destinations are set out in Table 5.6.

Table 5.6 Main Tenpin Bowling Destinations

Destination of Last Trip	% of Participating Households
MFA Bowl, Yeovil	68.0
AMF Hollywood Bowl, Taunton	21.1
Bridport	3.1
Southampton	2.5

Source: NEMS Household Survey, February 2017

5.29 MFA Bowl in Yeovil is the only bowling alley in South Somerset District and attracts around 68% of bowling trips within the study area. MFA Bowl has 18 lanes, and in June 2016 opened an indoor trampoline centre.

5.30 The study area population in 2017 (256,720 people) can in theory support circa 21 ten pin bowling lanes, based on the national average of one lane per 12,000 people. By 2034, the study area population (279,949) could support 23 lanes. Based on the District's market share (68%), South Somerset's existing provision (18 bowling lanes) appears to be adequate to meet demand over the plan period.

Bingo, Games of Chance and Gambling

5.31 The household survey results suggest that 2.4% of households in the study area visit bingo facilities, which is lower than the national average participation rate (5%). The main destinations are set out in Table 5.7.

Table 5.7 Main Bingo Destinations

Destination of Last Trip	% of Participating Households
Taunton	34.3
Yeovil	21.9
Bristol	6.1
Dorchester	4.9
Sherborne	4.2
Chard	3.7

Source: NEMS Household Survey, February 2017

5.32 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL).

5.33 The adult (over 18) population in the South Somerset study area (around 205,000 people[7]) would generate circa 359,000 admissions, based on the national participation rate (1.75 trips per adult). If South Somerset District could retain around two thirds of all bingo trips (239,000 trips) in line with the market share for other leisure activities, then there would be theoretical capacity for two bingo facilities in the District, based on national average figures (113,000 admissions per club). There is theoretical scope for a further bingo facility in addition to Top

[7] Based on the proportion of the adult population (18+) being 80%. Source: ONS Population estimates - South Somerset Profile based on nine year age bands (2016)

Ten Bingo in Yeovil. However, the dispersed population in the District may make this theoretical potential unviable for operators.

Other Leisure, Entertainment and Cultural Uses

5.34 The leisure, entertainment and cultural sector is fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted within town centres e.g. museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities such as trampoline centres, family entertainment centres, escape rooms and virtual golf centres. Given the fragmented nature of this sector, it is difficult to quantify the potential demand for these uses over the plan period.

5.35 The study area population is significant (256,700 people projected to increase to nearly 280,000 by 2034), and could provide the necessary critical mass to attract a range of leisure, entertainment, cultural uses and tourism attractions. In particular Yeovil benefits from the largest catchment population. The development strategy needs to be flexible and have the ability to response to emerging opportunities for new facilities of this kind.

Services, Restaurants, Bars and Takeaways

5.36 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** including restaurants, cafes (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

5.37 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

5.38 The key categories for food and beverage offers are:

- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax:** a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **Casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

5.39 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. The current mix of uses in the main centres in the District is summarised in Table 5.8 below.

5.40 The main centres within South Somerset have retained a good level of Class A1 retail use when compared with the national average, and the vacancy rate remains relatively low within most centres, with the exception of Wincanton, Somerton and Yeovil. All centres have a lower than average provision of Class A3 uses. Given the competing pressures for retail and non-retail uses and the relatively low vacancy rates (with the exception of Wincanton, Somerton and Yeovil), a balance between Class A1 and Class A3 to A5 uses needs to be maintained to ensure centres continue to fulfil their current roles.

Table 5.8 Mix of Class A / Food and Beverage Uses in the Main Centres in South Somerset

Town	Use Class % of Total Class A Units					
	A1	A2	A3	A4	A5	Vacant
Yeovil	51.7	12.6	8.8	3.2	6.7	16.9
Chard	61.7	15.8	5.8	1.7	5.0	10.8
Crewkerne	61.2	19.4	7.1	4.1	3.1	5.1
Ilminster	68.1	17.4	7.2	2.9	1.4	2.9
Wincanton	56.8	8.1	6.8	6.8	2.7	18.9
UK Average	**56.9**	**11.8**	**9.5**	**4.6**	**6**	**11.2**

Source: GOAD Data , SSDC Land Use Survey and Lichfields Survey, January 2017

5.41 With specific regard to Yeovil there is no one particular location in the town centre where restaurants are located. However, there appears to be small concentrations at various places, which includes:

- Eastern side of the town centre (Middle Street/South Western Terrace, Old Town Station): Frankie and Benny's, Pizza Hut, Wetherspoon, Beefeater, two Indian restaurants along with a Chinese, Italian and a Thai restaurant.
- Western side of the town centre (Princes Street, High Street): Italian restaurants such as ASK Italian and Prezzo as well as cafes and coffee shops.
- Central area (Bond Street): Indian Restaurant and Italian/Mexican Restaurant.

5.42 Generally there appears to be a large number of coffee shops and cafes compared to restaurants.

Food and Beverage Expenditure

5.43 Experian's food and beverage expenditure per capita projections are shown in Table 2, Appendix 4. The total food and beverage expenditure in the study area is £279.5 million in 2017; see Table 3, Appendix 4.

5.44 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 26% between 2017 and 2034. Taking into account population growth, total food and drink expenditure within the study is expected to increase from £ 279.5 million in 2017 to £385.6 million by 2034, an increase of 38% (Table 3, Appendix 4).

Food and Beverage Expenditure Patterns

5.45 A summary of food and beverage expenditure patterns is shown in Tables 5.9 and 5.10. The results indicate that the retention of food and beverage trips within South Somerset is similar to comparison goods shopping. Households have good access to a number of destinations and there is a propensity to visit different destinations. Yeovil is the main food and beverage destination in the District. However residents also visit a wide variety of villages.

5.46 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2017) penetration rates are shown in Table 4, Appendix 4 and expenditure patterns are shown in Table 5, Appendix 4. The estimated expenditure currently attracted to facilities within South Somerset District is £160.65 million in 2017.

Table 5.9 Food Destinations (restaurant/café destination named by respondents)

Destinations	% Market Share in each Area		
	South Somerset (Zones[8] 1, 2, 3, 4, 5 and 6)	Outer Zones (Zones 7, 8, 9)	Total
Yeovil	46.1	16.4	39.2
Wincanton	0.6	0.0	0.5
Chard	4.1	0.4	3.4
Somerton	1.3	0.6	1.1
South Petherton	1.6	0.4	1.3
Castle Cary	1.2	0.4	1.0
Ilminster	0.8	0.6	0.7
Crewkerne	2.7	0.0	2.0
Langport	2.2	0.0	1.7
Street	4.8	1.4	4.0
Sherborne	8.7	1.7	7.1
Bridport	0.4	18.4	4.6
Gillingham	1.7	14.2	4.6
Bristol	2.5	9.1	4.1
Taunton	3.4	0.0	2.6

Source: NEMS Household Survey, February 2017 (Question 33)

Table 5.10 Beverage Destinations (pub/bar destination named by respondents)

Destinations	% Market Share in each Area		
	South Somerset (Zones[9] 1, 2, 3, 4, 5, 6)	Outer Zones (Zones 7, 8, 9(	Total
Yeovil	32.8	3.5	25.6
Wincanton	7.6	0.9	6.0
Chard	6.8	0.0	5.1
Somerton	6.4	0.8	5.0
South Petherton	3.9	0.0	3.0
Castle Cary	1.6	6.4	2.8
Ilminster	3.3	0.0	2.5

[8] Zone 1 (Yeovil Area), Zone 2 (Wincanton Area), Zone 3 (Somerton/Langport Area), Zone 4 (Crewkerne Area), Zone 5 (Ilminster Area), Zone 6 (Chard Area), Zone 7 (Beaminster Area), Zone 8 (Sherborne Area), Zone 9 (Glastonbury Area)
[9] Zone 1 (Yeovil Area), Zone 2 (Wincanton Area), Zone 3 (Somerton/Langport Area), Zone 4 (Crewkerne Area), Zone 5 (Ilminster Area), Zone 6 (Chard Area), Zone 7 (Beaminster Area), Zone 8 (Sherborne Area), Zone 9 (Glastonbury Area)

Crewkerne	1.4	0.0	1.1
Langport	1.1	0.0	0.9
Street	0.2	24.6	6.1
Sherborne	2.2	15.8	5.6
Bridport	0.0	9.4	2.3
Gillingham	3.0	0.0	2.3
Bristol	1.3	3.8	1.9
Taunton	2.0	0.7	1.7

Source: NEMS Household Survey, February 2017 (Question 32)

Future Capacity for Food and Beverage Floorspace

5.47 The household survey suggests that the District's retention of food and beverage expenditure is lower than for convenience goods but higher than the retention of comparison goods expenditure. The levels of expenditure retention are relatively high (around 84%) within Zone 1 (Yeovil Area), 82% in Zone 4 (Crewkerne Area), 80% in Zone 3 (Somerton/Langport Area), but lower in Zone 6 (Chard Area - 61%), Zone 2 (Wincanton Area - 60%) and Zone 5 (Ilminster Area - 50%), where there are higher levels of leakage to Taunton.

5.48 Future improvements to food and beverage provision within the western parts of the District could help to claw back some additional expenditure leakage. Some development will be necessary in South Somerset in order to maintain existing market share in the future. Town centre strategies could focus on maintaining market share for the District.

5.49 Available food and beverage expenditure has been projected forward to 2019, 2024, 2029 and 2034 in Tables 6 to 9 in Appendix 4, and summarised in Table 11. Available food and beverage expenditure to facilities within the District is expected to increase from £160.65 million in 2017 to £221.33 million by 2034.

5.50 For the purposes of this assessment, the existing food and beverage floorspace is estimated to be trading at equilibrium in 2017 (i.e. satisfactory levels). Table 12, Appendix 4 then assumes that the turnover of food and beverage facilities will increase in real terms in the future. Growth in turnover efficiency is a function of spending growing at faster rates than new floorspace provision, as well as operators' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Allowing for this growth to be absorbed by existing food and beverage uses represents a cautious approach to forecasting future needs, helping existing centres maintain their vitality and viability and compete with new provision.

5.51 Unlike convenience and comparison retailing, Experian do not provide any advice on growth in turnover efficiency for food and beverage floorspace. However, it is important that existing facilities are allowed to increase their turnover over time. Taking into account the forecast expenditure per capita growth rates in the leisure sector, and the need to ensure that new spending is also available to support new facilities, a rate of 1% per annum is adopted for turnover efficiency of existing floorspace.

5.52 By 2019, within South Somerset District as a whole, there will be a food and beverage expenditure deficit of £3.17 million, due to growth in turnover efficiency off setting expenditure growth. By 2024, future expenditure growth generates an expenditure surplus of £4.71 million, which will grow to £14.64 million by 2029 and £25.31 million by 2034.

5.53 These expenditure projections have been converted into floorspace projections in Table 12, Appendix 4, adopting an average sales density of £5,000 per sq. m gross, which is again projected to grow by 1% in the future due to improved turnover efficiency. Surplus expenditure at 2024 could support 896 sq. m gross. In the longer term, surplus expenditure at 2029 could

support 2,650 sq. m gross, increasing to 4,360 sq. m gross by 2034. The results are summarised in Table 5.11 below.

Table 5.11 Summary of Food and Beverage Floorspace Projections (sq. m Gross)

Town	Additional Floorspace sq. m Gross		
	By 2024	**By 2029**	**By 2034**
Yeovil	502	1,489	2,452
Chard	70	197	320
Crewkerne	15	44	73
Ilminster	20	61	101
Langport	16	47	77
Somerton	45	136	225
Wincanton	76	224	367
Castle Cary	25	74	122
Martock	11	33	54
Other South Somerset	116	345	569
Total	**896**	**2,650**	**4,360**

Source: Table 12, Appendix 4

Qualitative Need

5.54 Yeovil town centre's Venuescore food/service index is 83 compared with the national average of 100. Chard has an index of 2, which reflects the predominance of independent rather than multiple/chain food and beverage outlets.

5.55 The proportional mix of Class A within the five main town centres shown in Table 5.8 indicates:

1 Yeovil has a lower than average provision of Class A3 café/restaurant uses, when compared with the national average, but a higher provision of Class A4 pubs/bars. The proportion of Class A5 takeaways is also higher than the national average.

2 Chard has a lower than average provision of Class A3 uses, when compared with the national average. The proportion of Class A4 uses is significantly lower than the national average and the proportion of Class A5 takeaways is also lower than the national average.

3 Crewkerne has a lower than average provision of Class A3, A4 and A5 uses, when compared with the national average.

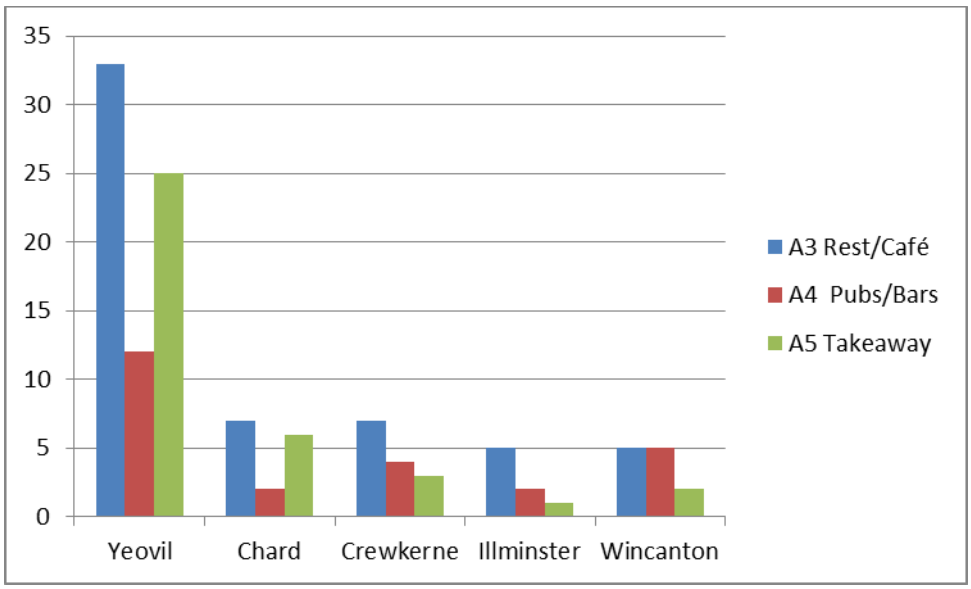
4 Ilminster has a lower than average provision of Class A3 and A4 and a significantly lower provision of Class A5 uses, when compared with the national average.

5 Wincanton has a lower than average provision of Class A3 uses, when compared with the national average. The proportion of Class A4 uses is higher than the national average, and the proportion of Class A5 uses is significantly lower than the national average.

5.56 The lower than average provision of Class A3 uses within Chard, Crewkerne, Ilminster and Wincanton reflect these small centres lower position in the hierarchy. These small centres generally serve local needs and services.

5.57 There are 119 food and beverage outlets within the five main town centres. In addition there are a number of country/village pubs throughout the District. The town centre audits in Appendix 5 provide a more accurate analysis of food and beverage provision within the five main town centres. The number of food and beverage outlets within each town centre is shown in Figure 5.3.

Figure 5.3 Class A3 to A5 Food and Beverage Outlets in each Town Centre



Source: SSDC Land Use Survey, January 2017 & Goad Data for Yeovil (2016)

Town Centre Offices

5.58 The adopted South Somerset Local Plan 2006-2024 seeks to deliver 149.51 hectares of land for economic development purposes across the district. Fifty hectares are required for Yeovil. Other main concentrations are in Chard (circa 17 hectares), Crewkerne (circa 10 hectares), Ilminster (circa 23 hectares), Wincanton (circa 8 hectares), Somerton (circa 6.5 hectares), Ansford & Castle Cary (circa 19 hectares) and Langport & Huish Episcopi (circa 4 hectares). Smaller amounts of land are identified as required across the Rural Centres. No requirement is identified for settlements below the Rural Centre tier but there is a recognition that land will be required to support the sustainable development of these places.

5.59 The Council has recently published new employment land evidence to inform the Early Review Local Plan[10]. This work has identified that for the period 2014-2034 (the period of the Early Review Local Plan) the Council will need to identify between 3-8 hectares of land for office development and between 42-85 hectares of land for industrial development. Land for other economic uses, such as retail, will also be required but is not identified.

5.60 National Guidance defines offices as main town centre uses. Their location in a town centre is beneficial, on the basis that office buildings tend to be used more intensively than other forms of employment use and therefore generate more footfall in the town centre, supporting its vitality and viability. Whilst the district is not perceived as a significant office location, demand does exist in Yeovil for small scale office development. The Early Review Local Plan should consider identifying land in Yeovil town centre to accommodate this need over the plan period."

Residential

5.61 Residential development can play an important role in ensuring the vitality of its centres and as such, it may be appropriate to encourage residential development on suitable sites to increase the amount of people living in and therefore supporting the town centre's services and facilities.

[10] South Somerset Employment Land Evidence: Long Term Economic Forecasting and Implications for Employment Sites and Premises & South Somerset Employment Land Evidence: Review of FEMAs and Understanding Market Trends, both Hardisty Jones Associates, July 2017

A greater population could help to support the evening economy and particularly the food and drink sector that is currently lacking in many of the centres.

Conclusions

5.62 A summary of the key findings in this Section is set out below:

- There is theoretical capacity for a small boutique cinema (up to 5 screens) in South Somerset District over the plan period.
- There is capacity for 3-5 health and fitness facilities (approximately 50 to 100 stations each) in the District over the plan period.
- There may be scope for an additional small (3-5 lane) ten pin bowling alley in the area.
- There is theoretical scope for one further bingo facility in the District. However, the dispersed population in the District may make this unviable for operators.
- Projections indicate that there is capacity for additional food and beverage outlets in the District with a further 896 sq. m gross supported by 2024, increasing to 2,650 sq. m gross by 2029 and 4,360 sq. m gross by 2034.
- Residential development should be encouraged on suitable in centre sites or at second floor level to bolster the evening economy within town centres.

6.0 Planning Policy Analysis

Introduction

6.1 This section reviews the current policy approach to retail and town centres as set out in the South Somerset Local Plan (2006-2028) in the light of findings within previous sections of this report.

6.2 National Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan a lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres.

6.3 The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites.

6.4 Consistent with the sequential approach, town centres are expected to be the main focus for retail and leisure development. The NPPF does not require development to be of an appropriate scale and nature in relation to the centre in which it is located, but larger town centres have the best prospects for attracting investment from developers and multiple operators.

6.5 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq. m gross. The CLG Practice Guidance indicates that it may be necessary to consider the impact of proposals below this floorspace threshold, e.g. large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre. The Planning Practice Guidance provides more guidance on setting a locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

6.6 This section considers the appropriate impact threshold for each main town in South Somerset.

6.7 The designation of primary shopping areas or centre boundaries is important when applying the sequential approach, in order to direct retail and town centre uses to sustainable locations and determining whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area (PSA), which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

6.8 The NPPF also indicates that policies that control the mix of uses can be adopted in order to maintain the vitality and viability of town centres. Planning authorities can define primary and

secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. This section examines town centre boundaries and reviews the existing retail policies contained within the South Somerset Local Plan.

Policy EP9 – Retail Hierarchy

6.9 The NPPF (paragraph 23) indicates that planning policies should define a network and hierarchy of centres that is resilient to anticipated economic changes. The PPG indicates that planning policies should identify the appropriate and realistic role, function and hierarchy of centres over the plan period. The PPG also indicates that strategies should identify changes in the hierarchy, including where a centre is in decline.

6.10 Policy EP9 sets out a four tier retail hierarchy for the District. Policy EP9 indicates that the development of main town centre uses in Yeovil, the Market Towns, District Centres and Local Centres, should be of a scale that is commensurate with the settlement role and function and does not unbalance the town centre hierarchy.

6.11 This approach is consistent with the NPPF and the development plan should continue to identify the hierarchy of centres and ensure new main town uses are focused within these town centres. Policy EP9 could be better linked to other policies relating to retail floorspace capacity and impact thresholds in order to provide more guidance on what scale of development is likely to be commensurate with the settlement role. Policy EP9 should also make it clear that the Local Plan objective is to maintain the vitality and viability of the centres identified within the hierarchy, which is linked to Policy EP11.

6.12 The current retail hierarchy is set out as follows:

Table 6.1 Retail Hierarchy

Category	Settlement
Principal Centre	Yeovil
Market Towns	Chard, Crewkerne, Ilminster and Wincanton
District Centres	Ansford/Castle Cary, Langport/Huish Episcopi and Somerton
Local Centres	Bruton, Ilchester, Martock, Milborne Port, South Petherton and Stoke sub Hamdon

Source: SSDC Local Plan

6.13 Based on the scale of facilities available within each settlement and the retail floorspace projections in this study, the current retail hierarchy remains appropriate and no changes are required. Somerton is the largest District Centre and has a similar number of commercial units when compared with Ilminster and Wincanton market towns, but Somerton is much smaller it terms of retail sales floorspace. Somerton should remain designated as a District Centre.

Policy EP10 – Convenience and Comparison Shopping in Yeovil

6.14 Policy EP10 quantifies the upper limit for new retail floorspace in Yeovil. If this policy approach is carried forward then the floorspace projections within the policy will need to be updated in line with the revised retail capacity assessment within this report. Policy EP10 does not quantify the capacity for retail development in other towns within the District, although the market town vision section of the Local Plan does outline retail floorspace projections within the supporting text. The Council should consider whether Policy EP10 should be expanded to include floorspace projections for other towns.

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

1 major retail developments in competing centres;

2 the re-occupation of vacant retail floorspace;

3 the availability of land to accommodate new development;

4 the reliability of long term expenditure projections;

5 the effect of internet/home shopping on the demand for retail property;

6 the level of operator demand for floorspace in South Somerset;

7 the likelihood that South Somerset's existing market share of expenditure will change in the future in the face of increasing competition; and,

8 the potential impact new development may have on existing centres.

6.16 As indicated above, the PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2026 are realistic and are based on up-to-date (post EU referendum) forecasts. The longer term floorspace projections (up to 2034) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

6.17 Given these uncertainties regarding long term growth, Policy EP10 could provide indicative floorspace projections, rather than upper floorspace limits particularly in the long term, e.g. a schedule of floorspace projections could be included within the policy or supporting text.

Policy EP11 – The Sequential Approach

6.18 Policy EP11 primarily relates to the sequential approach, which indicates that applications for town centre uses that are not in an existing town centre and not in accordance with an up to date development plan should be refused planning permission where the applicant has not demonstrated compliance with the sequential approach to site selection. Policy EP11 also indicates that development should not seriously affect the vitality and viability of a nearby town centre. The supporting text states that the town centre boundaries and Primary Shopping Areas (PSA) (as identified on the proposals map) is where new town centre uses will be accommodated.

6.19 The designation of town centre boundaries and primary shopping areas is important when applying the sequential approach, in order to direct retail and town centre uses to sustainable locations and determining whether a retail impact assessment is required.

6.20 The NPPF indicates that the first preference for retail uses should be the PSA, which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

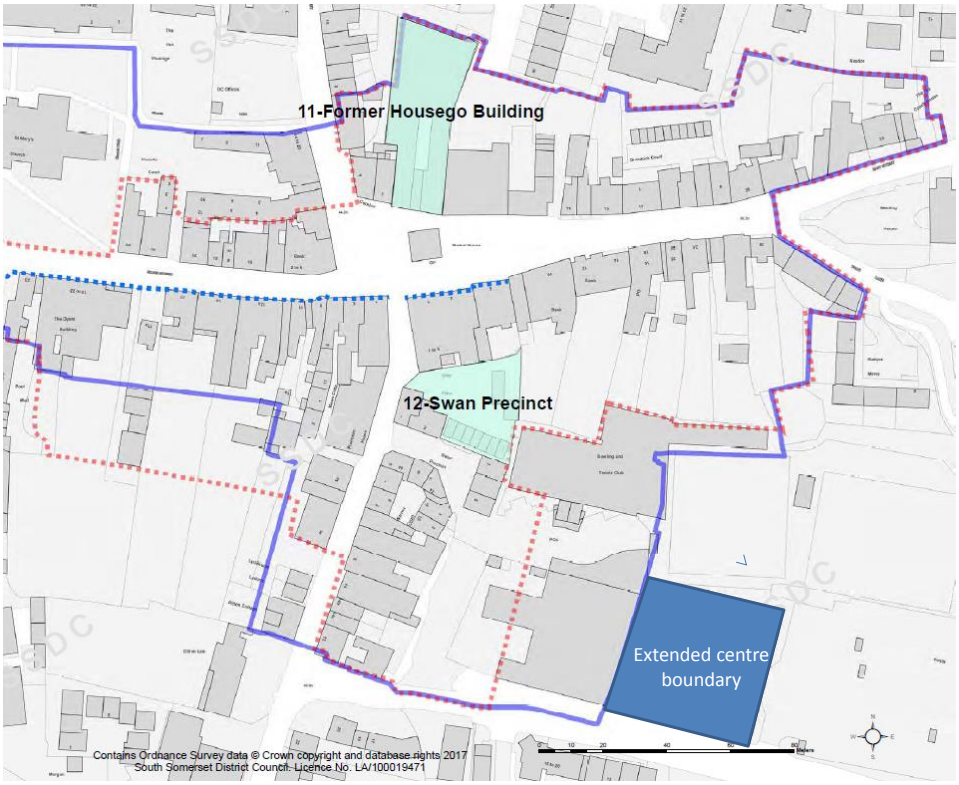
6.21 Town centre boundaries include retail, leisure and other town centre uses. Within the wider town centre boundary, the PSA should contain the retail frontages where Class A1 retail uses are concentrated. The application of the sequential approach indicates that retail uses should be focused within the PSA. Other town centre uses such as commercial leisure and office uses should be focused within the wider town centre boundary.

6.22 Policy EP11 is consistent with the NPPF in terms of the sequential approach, PSA and town centre boundary definitions. Lichfields has reviewed the current town centre boundaries for Yeovil and the Market Towns. The town centre boundaries are relatively tightly drawn around the main town centre uses within each town, and generally exclude surrounding residential areas.

Potential Amendments

6.23 The Ilminster town centre boundary includes half of the Tesco store. It could be expanded to include the whole store for consistency with other centre boundaries as shown in Figure 6.1.

Figure 6.1 Amended Town Centre Boundary for Ilminster

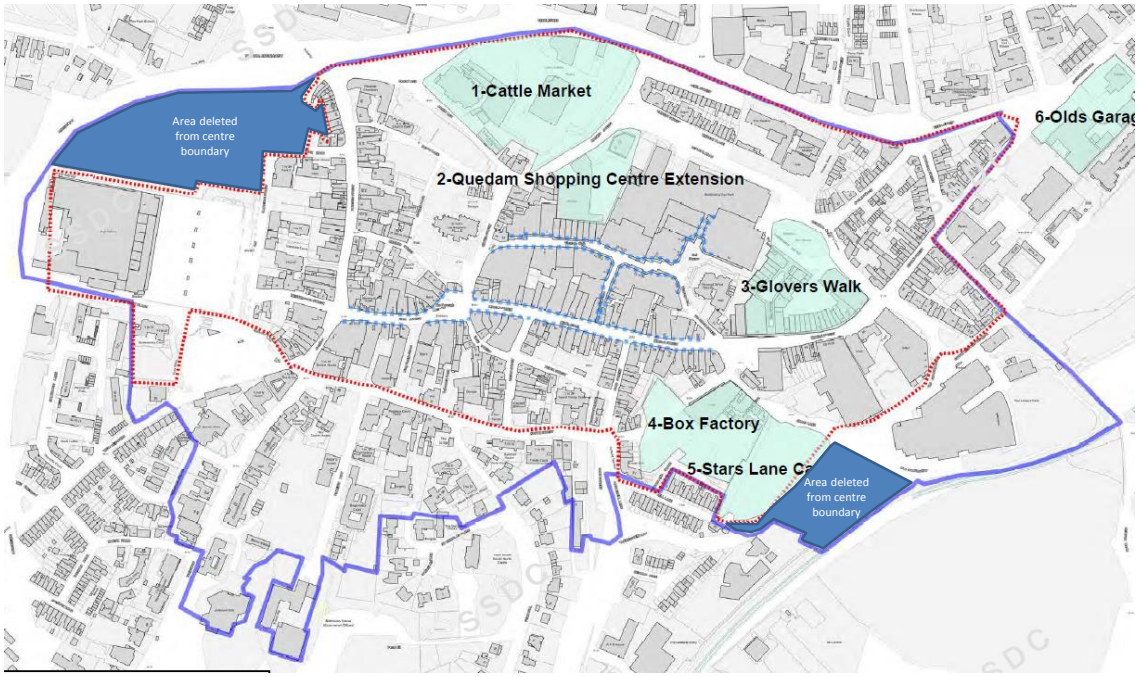


Source: SSDC / Lichfields

6.24 The PSA's within the four Market Towns cover similar areas when compared with the town centre boundaries, and the two designations are identical in Wincanton. Based on Lichfields' experience, in most town centres the area between the PSA and the town centre boundary tends to be occupied by non-retail main town centre uses e.g. leisure, office and civic uses. The Market Towns in South Somerset do not have extensive areas where non-retail main town centre uses are located. The need to identify two separate town centre and PSA boundaries should be considered. The Council could delete the primary shopping areas in the four Market Towns and adopt the town centre boundary as the policy basis for applying the sequential approach, i.e. the same approach currently adopted in Wincanton. For the avoidance of doubt, the supporting text should indicate that the town centre boundaries perform the same role as PSAs.

6.25 Within Yeovil town centre there are relatively large peripheral areas that are predominantly in non-retail use, which suggest a separate town centre boundary and a PSA remains appropriate. The area south of South Street has a broad mix of uses and should remain outside the PSA. However residential uses on the south side of Summer House Terrace and possibly residential uses north of the Tesco store could be excluded from the town centre boundary, as shown in Figure 6.2. The areas north and east of Central Road could be excluded from the PSA because the frontages are not continuous or well connected with other shopping frontages within the town centre.

Figure 6.2 Suggested Amended Yeovil Town Centre Boundary



Source: SSDC /Lichfields

Policy EP12 – Impact Thresholds

6.26 With regard to retail impact, Policy EP12 sets out the impact thresholds for the different tiers of the retail hierarchy. Proposals for retail floorspace above these existing thresholds will require a retail impact assessment. Policy EP12 includes thresholds lower than the NPPF guidance (over 2,500 sq. m gross).

6.27 Lichfields' analysis confirms the impact threshold in the NPPF (over 2,500 sq. m gross) is disproportionate in relation to the existing scale of most town centres within South Somerset, and development of this scale would exceed or represent a significant proportion of the overall floorspace projection for each town over the plan period. The impact of smaller developments needs to be considered in line with Policy EP12. Based on the scale of facilities available within each settlement and the retail floorspace projections in this study, the current impact thresholds remain appropriate:

- Yeovil over 2,500 sq. m gross;
- Market Towns over 750 sq. m gross;
- Langport District Centre over 500 sq. m gross;
- Other District Centres over 250 sq. m gross; and,

- Local centres over 250 sq. m gross.

Policy EP13 – Protection of Retail Frontages

6.28 Policy EP13 seeks to protect retail frontages within the District resulting from change of use from Use Class A1 (retail) to non-retail on ground floors. The policy sets out clear guidance where changes of use will be considered inappropriate. The impact criteria include:

1 the location and prominence of the premises within the shopping frontage;

2 the floorspace and length of frontage of the premises;

3 the number, distribution and proximity to other non-A1 use class premises (or with consent for such use) within the frontage in question and throughout the town centre;

4 the character and nature of the use proposed, including the level of pedestrian activity associated with it;

5 the level of vacancies; and

6 whether the proposed use would give rise to noise, smell or other environmental problem.

6.29 Primary Shopping Frontages have been identified in the Local Plan for Yeovil, Chard, Crewkerne, Ilminster, Langport and Somerton, but not in Wincanton.

6.30 The NPPF indicates that policies that control the mix of uses can be adopted in order to maintain the vitality and viability of town centres. Planning authorities can define primary and secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. The NPPF provides limited guidance on the definition of primary and secondary frontages, or how policy should seek to balance diversity and the need to maintain retail uses in town centres. Recent changes to the GPDO allow for greater flexibility for changes of use. To date these measures do not appear to have had a significant impact on South Somerset's town centres, but they will limit the scope for Policy EP13 to control the change of use of smaller shop units. Bearing this issue in mind, it is important for Policy EP13 to control the use of larger units. Policy EP13 was adopted after the NPPF was published and the approach is appropriate.

6.31 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres, but this approach could result in the deterioration of shopping frontages in the District, and this could undermine their role as shopping centres.

6.32 Policy EP13 acknowledges that non A1 uses can contribute positively to the town centre in accordance with the NPPF. Criterion 4 could be strengthened by a minor amendment, as follows:

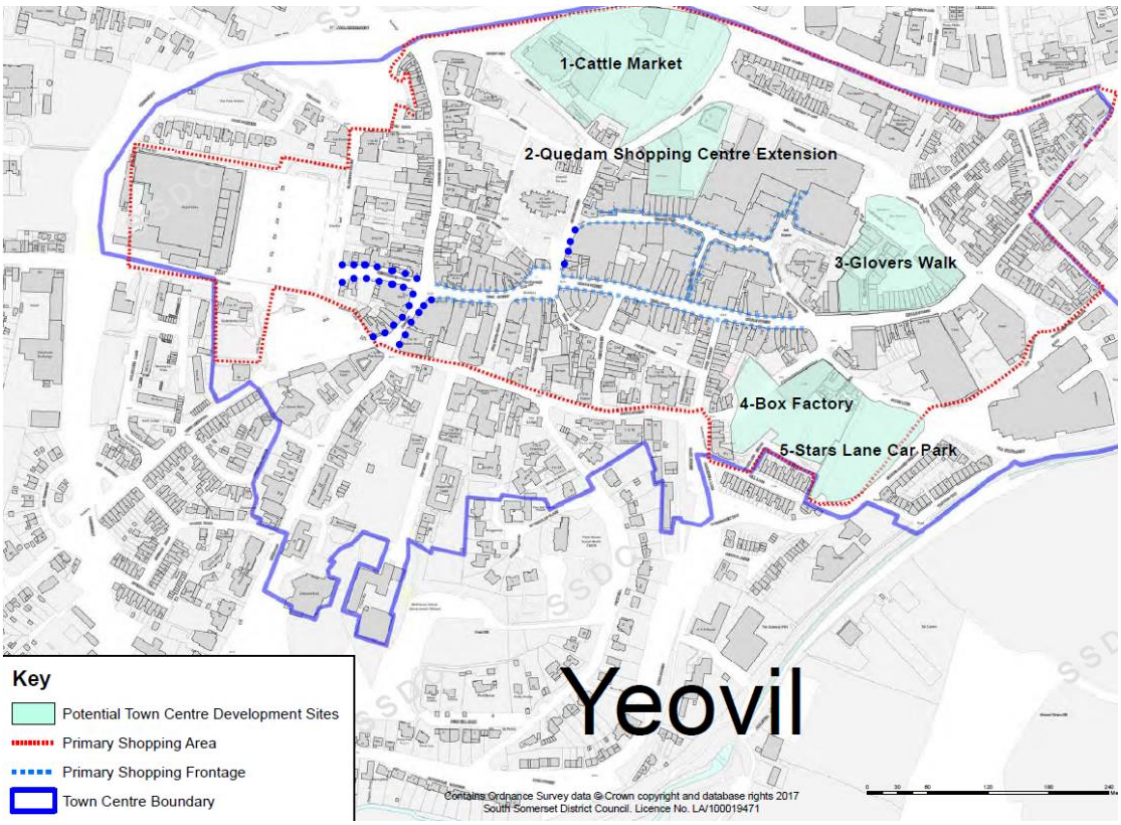
"The character and nature of the use proposed, including the level of pedestrian activity associated with it <u>and its contribution to the vitality and viability of the centre</u>."

Potential Amendments

6.33 Lichfields' review of the Primary Shopping Frontage suggests the following minor amendments should be considered.

6.34 Within Yeovil the Primary Shopping Frontages make up a relatively small part of the town centre's shopping frontages. The non-designated frontages provide a reasonable degree of flexibility. The primary frontages run along High Street, Union Street, Middle Street and Vicarage Walk. The Tesco store lies to the west and footfall between the Tesco and High Street is relatively high. There is scope to expand the primary frontage along the pedestrianised part of Hendford and along Westminster Street, as shown in Figure 6.3.

Figure 6.3 Suggested Yeovil Primary Shopping Frontage Amendment

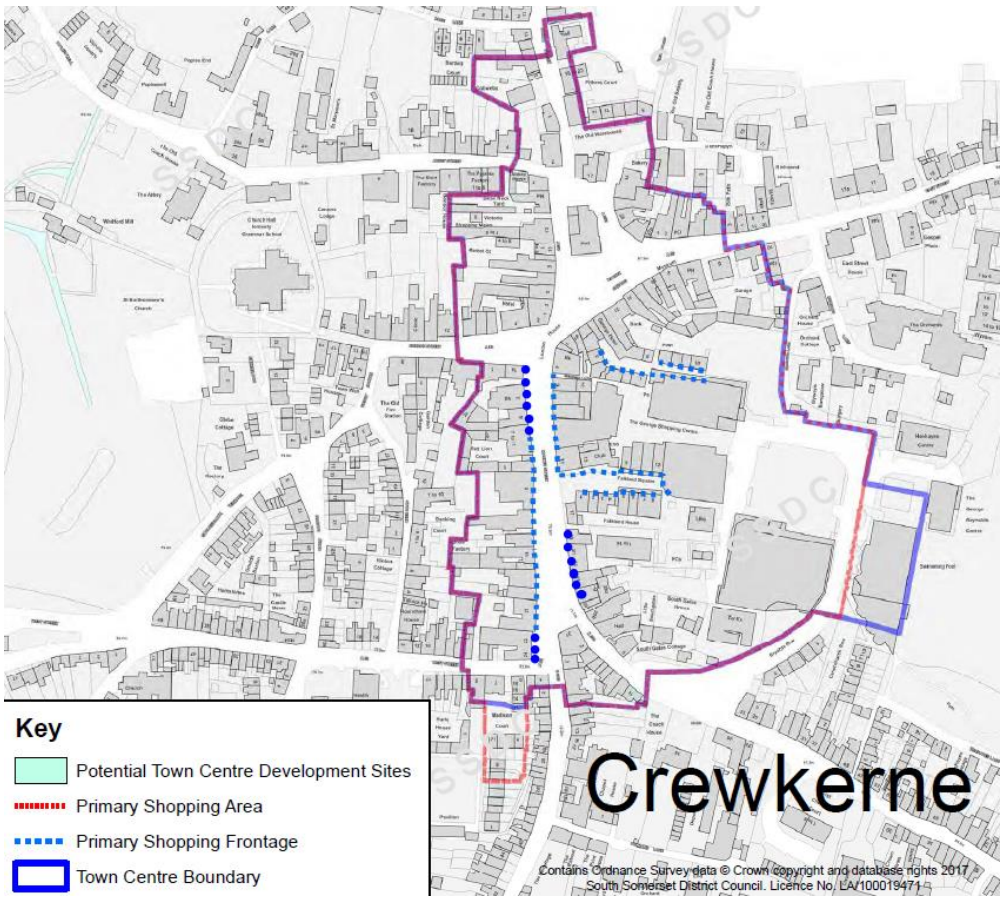


Source: SSDC/Lichfields

6.35 Within Crewkerne the Primary Shopping Frontages also make up a relatively small part of Crewkerne's shopping frontages. The Primary Shopping Frontage runs along part of Market Street and Falklands Square and an unnamed street running through the George Hotel and alongside the Lidl Store. The primary frontages could be extended to include all parts of Market Street, where there are a number of Class A1 uses, as shown in Figure 6.4.

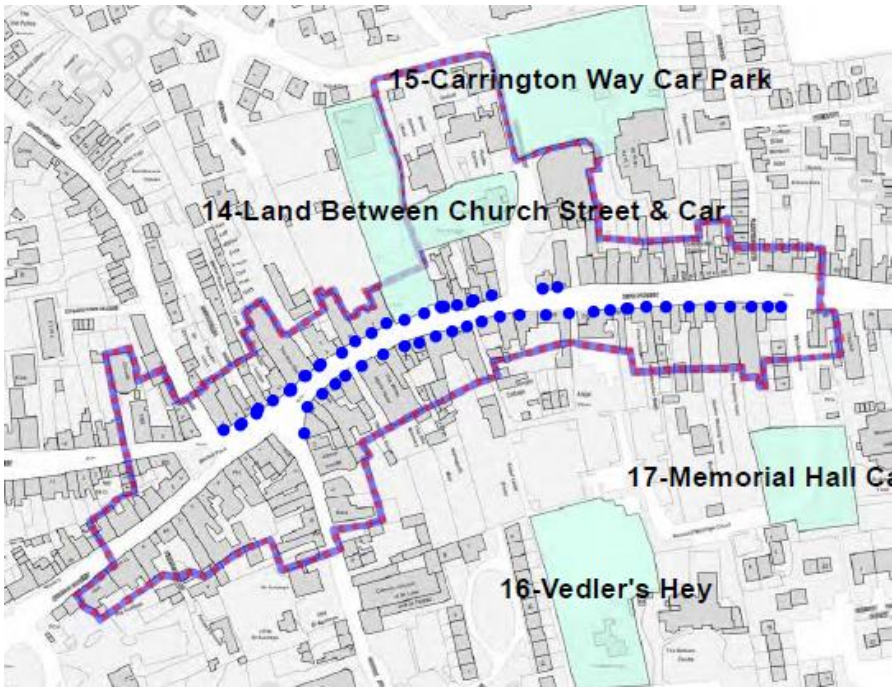
6.36 Primary Shopping Frontages have not been defined for Wincanton Town Centre but it is considered that this could be done. The main retail core within Wincanton should be protected and extended along High Street from Wincanton Methodist Church in the east to the Town Hall in the west, as shown in Figure 6.5.

Figure 6.4 Suggested Crewkerne Amended Primary Shopping Frontage



Source: SSDC / Lichfields

Figure 6.5 Suggested Wincanton Primary Shopping Frontage



Source: SSDC / Lichfields

Policy EP14 – Neighbourhood Centres

6.37 Local Plan Policy EP14 states that development within neighbourhood centres should be of a scale and type to meet the local needs of the area within which they will be located and must not adversely affect the vitality and viability of any town centre identified by the Local Planning Authority.

6.38 Neighbourhood centres are small parades of shops. They fall below Local Centres within the hierarchy and would not be considered to be town centres in policy terms. The supporting text to Policy EP14 could be amended to clarify this definition.

6.39 Policy EP14 could be cross referenced with Policies EP11 and EP12. Policy EP12 indicates that applicants proposing out of centre development of over 250 sq. m gross will be required to assess retail impact. It would not be consistent to require development within neighbourhood centres below this threshold to assess retail impact.

Policy EP15 – Local Shops, Community Facilities and Services

6.40 Policy EP15 seeks to protect local shops, community facilities and services. The NPPF requires local planning authorities to take into account the importance of local shops and services to communities when considering planning applications affecting such facilities. The guidance states that planning policies and decisions should guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs.

6.41 As a predominantly rural District with an ageing population, the importance of maintaining access to facilities will become increasingly important. The approach within Policy EP15 should be maintained.

7.0 Car Parking Review

Overview

7.1 This section outlines the car parking review undertaken by Vectos. This review is based on a study undertaken by Hydrock on behalf of South Somerset District Council (SSDC). Hydrock's assessment addressed the overall level of car parking in each settlement, including the total number of spaces, the number of disabled parking spaces, the number of electric vehicle charging spaces and the number of car share spaces.

Yeovil Town Centre

7.2 There are a number of car parks within and surrounding Yeovil Town Centre which are owned and operated by SSDC, in addition to further car parks owned and operated by private operators e.g. Tesco (800 spaces), Quedam Shopping Centre (650 spaces) and Yeovale Leisure Park (400 spaces). These provide long and short term car parking for leisure, retail and commuting use.

7.3 An analysis of the Council owned and operated car parks has been undertaken to determine which car parks are currently well utilised and those which are under-utilised. This has drawn on information provided by the Council on the revenue generated by car parks, previous car parking studies commissioned by SSDC and a snapshot parking survey undertaken by Hydrock on 25th January 2017. This information has been categorised and ranked in terms of importance and identifies which could potentially provide the best opportunity for development without a significant impact on car parking capacity.

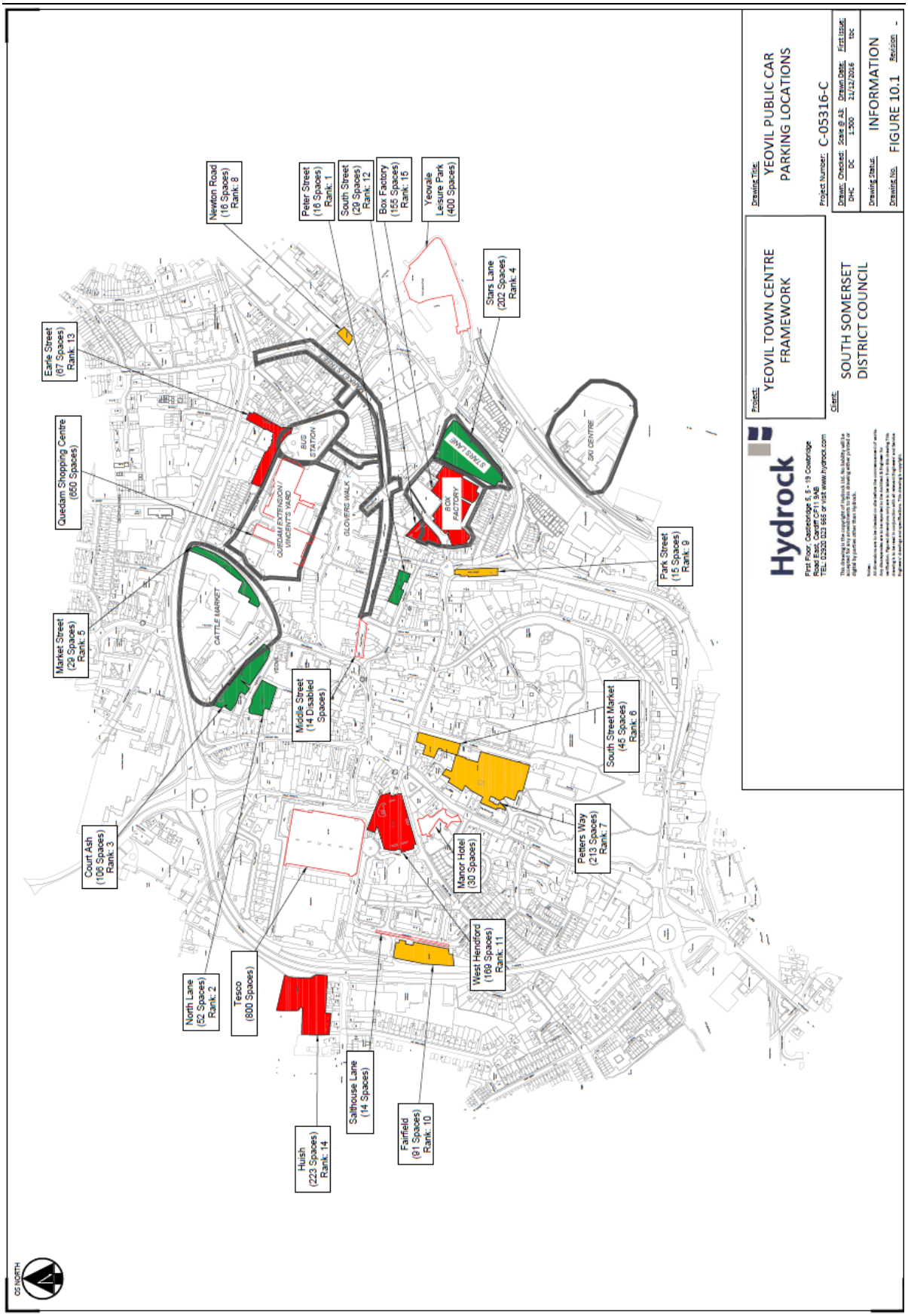
7.4 The car parks which have been included within the analysis are summarised within Table 7.1, which includes the capacity and duration of parking available. The car parks are shown on a plan in Figure 7.1 shown below. This plan also shows the groups of rankings which have been summarised in three categories based on the analysis within this section – in simple terms these categories are most used, averagely used and least used.

Table 7.1 Yeovil Town Centre Car Parks

Car Park	Spaces	Short/Long Stay
Box Factory	128	Short Stay
Court Ashay	106	Short Stay
Earle St	67	Short and Long Stay
Fairfield	91	Short Stay
Huish	223	Short and Long Stay
Market St	29	Short Stay
Newton Rd	16	Short Stay
North Lane	52	Short Stay
Park St	15	Short Stay
Peter St	16	Short Stay
Petters Way	213	Short Stay
South St	29	Short Stay
South Street Market	45	Short Stay
Stars Lane West	202	Short and Long Stay
West Hendford	169	Short Stay
Privately operated car parks	1,894	n/a
Total	**3,295**	

Source: Hydrock and South Somerset District Council

Figure 7.1 Yeovil Town Centre Car Parks



7.5 The large car parks located at the Quedam Centre (c.650 spaces), Tesco (c.800 spaces) and Yeovale Leisure Park (c.400 spaces) play a significant role in accommodating vehicles using the Town Centre. These have not been analysed within this report as they are not owned and operated by SSDC and limited data is available.

7.6 Car parking demand and supply has been set out as presented within the applicable reports. As such, dependent on the year of the survey and the results presented, the number of car parking spaces in each car park changes slightly.

Yeovil Car Parking Demand Surveys

7.7 Car Parking surveys were carried out by SSDC in November 2007 and March 2011 as part of a study to review car parking demand within Yeovil (Yeovil Car Parking Analysis, SCC and SSDC, May 2011). The demand at each of the car parks was derived from interviews and entry and exit counts carried out between 7am and 7pm.

7.8 The results of the surveys are summarised in Table 7.2 and 7.3. Only some of the car parks have been surveyed in 2007 and as such the results have been presented only for these car parks. The results have also been presented based on the maximum number of vehicles parked at any one time in each of the car parks. As such, the overall total level of parking presented is very much a robust worst case as this maximum level does not occur at the same time in all car parks.

Table 7.2 Yeovil Town Centre Car Parking Survey Results 2007

Car Park	Spaces	Max Vehicles Parked	Spare Spaces	% Usage	Rank
Peter's Street	23	76	-53	330	1
Petters Way	212	2547	-35	117	2
West Hendford	167	164	3	98	3
Fairfield	91	83	8	91	4
Stars Lane	201	171	30	85	5
Huish	223	163	60	73	6
TOTAL	**917**	**904**	**13**	**99**	

Source: Hydrock - extracted from Table 4.1 of the Yeovil Car Park Report 2011

7.9 The survey results from the car parking surveys conducted in 2007 and 2011 demonstrate that the demand exceeded supply at a number of car parks within the vicinity of the Town Centre. In particular, Peter Street showed demand well over capacity, however there were a number of discrepancies outlined within the report as the car park was used by the adjacent taxi firm, people parked to use the public toilets and vehicles waiting in disabled spaces for other spaces to become available. The data does not reliably indicate car parking demand for visits to the Town Centre.

7.10 The 2011 survey indicated a maximum occupancy of 78% of car parking spaces across the Town Centre, even when combining the maximum occupancy across each of the car parks. This also includes the Peter Street car park results which would not be able to accommodate 81 vehicles as indicated within the survey. As such the likely spare capacity in the SSDC car parks during this survey period is considered to be at least 350 car parking spaces.

Table 7.3 Yeovil Town Centre Car Parking Survey Results 2011

Car Park	Spaces	Max Vehicles Parked	Spare Spaces	% Usage	Rank
Peter's Street	23	81	-58	352	1
Market Street	28	32	-4	114	2
Petters Way	212	239	-27	113	3
South St Market	45	41	4	91	4
Stars Lane	201	183	18	915	5
North Lane	52	47	5	90	6
Court Ash	70	53	17	76	7
Earle Street	70	53	17	76	7
Fairfield	91	65	26	71	9
South Street	29	18	11	62	10
West Hendford	167	82	85	49	11
Box Factory	128	60	68	47	12
Park Street	15	7	8	47	13
Huish	223	102	121	46	14
Newton Road	16	7	9	44	15
TOTAL	**1,370**	**1,070**	**300**	**78**	

Source: Hydrock - extracted from Table 4.2 of the Yeovil Car Park Report 2011

7.11 There is only the spare capacity identified within the car parks in the Town Centre that form part of this study. The 2011 car parking analysis also considered parking in other car parks across the town including the Yeovale Leisure Park, Goldcroft, Houndstone, Tesco and Quedam car parks. Based on the entire study, the surveys identified that approximately 672 car parking spaces were vacant in 2007 and 1,244 car parking spaces were vacant in 2011. In particular the Quedam Centre and Tesco car parks had occupancy rates of 84% and 79% recorded respectively indicating spare capacity in these car parks.

Yeovil 2012 Car Park Demand / Capacity Analysis

7.12 A car parking survey was carried out by SSDC for all car parks within Yeovil maintained by the Council. The surveys were carried out between July and September 2012 on Wednesdays and Saturdays between 11:00 and 13:00. The data is based on tickets purchased and includes season ticket sales, which have been assumed by Hydrock at 100% occupied. This is considered to be a robust assumption and would overestimate the likely occupancy in each car park.

7.13 The results of the surveys are summarised in Table 7.4. The results have been summarised by the average maximum occupancy for each car park across the period as a combination of the actual maximum occupancy is not an accurate representation of the overall capacity of all car parks at any one time. Indeed on the worst case day the maximum occupancy was 78% of all spaces (even allowing for the robust season ticket sales assumptions).

7.14 The results of the car park surveys between July and September 2012 demonstrate that considering a robust worst case analysis (allowing for 100% season ticket occupancy), there were on average 460 spare car parking spaces in Yeovil with an overall occupancy level of 67%.

Table 7.4 Yeovil Town Centre Car Parking Survey Results 2012

Car Park	Spaces	Max Vehicles Parked	Spare Spaces	% Usage	Rank
North Lane	52	52	0	100	1
Peter's Street	16	16	0	100	1
Market Street	29	27	2	93	3
Stars Lane	202	181	21	90	4
Petters Way	213	185	28	87	5
South St Market	45	39	6	87	6
Court Ash	106	88	18	83	7
Newton Road	16	12	4	75	8
West Hendford	169	119	50	70	9
South Street	29	20	9	69	10
Park Street	15	10	5	68	11
Fairfield	91	59	32	65	12
Earle Street	67	42	25	63	13
Box Factory	128	61	67	48	14
Huish	223	30	193	14	15
TOTAL	**1,401**	**941**	**460**	**67**	

Source: Hydrock

Note - Average max. capacity on: Weds 4/7, Sat 7/7, Wed 18/7, Sat 21/7, Wed 15/8, Sat 25/8, Wed 12/9, Sat 15/9.

Yeovil Car Parking Revenue Analysis

7.15 SSDC has provided revenue information for their car parks from the 2014/15 and 2015/16 financial years. Using the car parking capacity for each car park, as set out in the 2016 Yeovil Schedule of Car Parks, obtained from the SSDC's website, the parking revenue per space has been obtained. This allows a comparison of the car parks by revenue generated on an equal basis (broadly by footprint).

7.16 The results of the car parking revenue analysis are set out in Table 7.5 with the order of the car parks having been ranked based on revenue generated per space.

7.17 Based on the revenue analysis, Peters Street, North Lane and South Street Market car parks generate the most revenue by car parking space and Stars Lane is the highest revenue generator in total.

7.18 The data also indicates that the usage of the Petters Way, West Hendford and Fairfield car parks increased between 2014/15 and 2015/16 (assuming charges remained the same). In addition, the Court Ash, Stars Lane, Huish and Newton Road car parks fell during the same period.

Table 7.5 Yeovil Town Centre Car Parking Revenue Analysis

Car park	2015/2016 Total £	2014/2015 Total £	Spaces	Revenue Per Space 2015/16 £	Revenue Per Space 2014/15 £	Per Space Rank 15/16	Per Space Rank 14/15
Peter's St	48,605	47,168	16	3,038	2,948	1	1
North Lane	100,955	103,487	52	1,941	1,990	2	2
South St Market	65,735	62,699	45	1,461	1,393	3	4
Court Ash	140,702	157,676	106	1,327	1,488	4	3
Stars Lane	214,515	271,763	202	1,062	1,345	5	5
Newton Rd	12,226	18,966	16	1,014	1,185	6	6
Park St	14,069	12,145	15	938	810	7	8
South St	26,499	26,412	29	914	911	8	7
Petters Way	186,381	143,698	213	875	675	9	12
West Hendford	144,928	121,963	169	858	722	10	9
Market St	23,018	20,527	29	794	708	11	10
Earle St	44,893	47,407	67	670	708	12	11
Fairfield	56,127	49,125	91	617	540	13	13
Box Factory	78,238	77,832	128	505	502	14	14
Huish	39,352	54,904	223	176	246	15	15
Total	**1,200,243**	**1,215,773**	**1,401**	**857**	**868**		

Source: Hydrock for South Somerset District Council.

Hydrock January 2017 Yeovil Car Park Snapshot Survey

7.19 A snapshot survey of cars parked within each car park was carried out on Wednesday 25th January 2017 between the hours of 11:30 and 12:30 by Hydrock staff. The results of the snapshot survey are set out in Table 7.6.

7.20 The snapshot survey identified that there were 580 spare car parking spaces within the car parks across the Town Centre. On the survey day anecdotal evidence was provided by a parking enforcement officer that this was a typical demand for parking in Yeovil and there was always spare capacity across the town.

Table 7.6 Yeovil Town Centre Car Parking Survey Results January 2017

Car Park	Spaces	Ave. Max Vehicles Parked	Spare Spaces	Usage %	Rank
Market Street	29	29	0	100	1
Court Ash	106	104	2	98	2
Fairfield	91	89	2	98	3
North Lane	52	48	4	92	4
Peter's Street	16	13	3	81	5
Huish	140	99	41	71	6
Stars Lane	202	116	86	57	7
Petters Way	213	116	97	55	8
Park Street	15	7	8	47	9
Earle Street	67	29	38	43	10
West Hendford	169	68	101	40	11
Newton Road	16	5	11	31	12
South St Market	45	11	34	24	13
Box Factory	155	28	127	18	14
South Street	29	3	26	10	15
TOTAL	**1,345**	**765**	**580**		

Yeovil Summary

7.21 The rankings from all surveys (with the exception of the 2007 survey) have been combined to provide a broad overall ranking score for each of the car parks. This provides a rough estimate of the importance that each car park provides across Yeovil Town Centre from both a usage and revenue generating perspective. The combined ranking is set out within Table 7.7. As the survey methods were all different, the capacity of the car parks has differed across surveys and there are some discrepancies in the data (for example at Peter's Street), a comparison of occupancy rates has not been undertaken.

7.22 The overall rankings of the car parks are shown in Figure 7.1 earlier in this Section. For simplicity and comparison this shows the car parks ranked from 1-5 in red (least used), ranked 6-10 in yellow (averagely used) and 11-15 in green (most used).

7.23 Based on the analysis undertaken within this chapter, the most utilised and highest revenue generating car park per space is Peter's Street car park. The top five car parks are the three car parks in and around the Cattle Market site, as well as the Peter's Street car park and Stars Lane. It is clear that these car parks perform a key role in Yeovil Town Centre and any strategy for developing the Town Centre would need to fully consider the role of these car parks within the town.

7.24 It can also be seen that the bottom five car parks are the Box Factory, Huish, Earle Street, South Street and West Hendford. South Street and the Box Factory are adjacent to each other and accessed from South Street and therefore may provide a useful redevelopment opportunity. The West Hendford car park has been stated as unattractive and a security issue from discussions with stakeholders in Yeovil. As such, there is the potential for further use of this car park, with improvements to the lighting, security and attractiveness. The Earle Street car park is underutilised and as such the use of part of this car park for a potential new access road linking to Central Road may be achievable. Finally, the Huish car park scored poorly in the revenue count, but was relatively well occupied on the Hydrock site visit. Part of the car park has been

set out for Purple Zone parking which is used by Hospital staff (around 75 spaces). It is understood that this is a relatively recent development and this may partly explain the change in utilisation of this car park between surveys. A new hospital car park is proposed and this should free up long stay capacity within the town centre.

Table 7.7 Overall Yeovil Town Centre Car Parking Rank

Overall Rank	Car Park	Jan 2017 Survey Rank	2012 Survey Rank	2011 Survey Rank	2015/16 Revenue Per Space Rank	2014/15 Revenue Per Space Rank	Combined Rank
1	Peter's Street	5	1	1	1	1	9
2	North Lane	4	6	1	2	2	15
3	Court Ash	2	7	7	4	3	25
4	Stars Lane	7	5	4	5	5	26
5	Market Street	1	2	3	11	10	27
6	South St Market	13	4	6	3	4	30
7	Petters Way	8	3	5	9	12	37
8	Newton Road	12	15	8	6	6	47
9	Park Street	9	13	11	7	8	48
10	Fairfield	3	9	12	13	13	50
11	West Hendford	11	11	9	9	9	50
12	South Street	15	10	10	7	7	50
13	Earle Street	10	7	13	11	11	53
14	Huish	6	14	15	15	15	65
15	Box Factory	14	12	14	14	14	68

Car Parking Provision within the Main Centres

7.25 To understand the existing level of parking provision in the five settlements of Yeovil, Wincanton, Chard, Crewkerne and Ilminster, Vectos and Lichfields have reviewed the existing number of parking spaces, retail turnover, the number of people working in each settlement and the modes of travel for shopping indicated by the household survey results, as summarised in Table 7.8.

Table 7.8 Summary of Parking Provision in South Somerset's Main Town Centres

Town	Parking Spaces	Town Centre Retail Turnover 2017 £M	Turnover Per Parking Space £	Workers	Workers Per Parking Space
Yeovil	3,295	458.4	139,200	27,154	10.8
Wincanton	256	26.3	102,700	2,634	10.3
Chard	872	73.6	84,400	5,252	6.0
Crewkerne	514	35.3	68,700	2,244	4.4
Ilminster	355	30.0	84,500	2,015	5.7
TOTAL	**5,292**	**623.7**	**117,900**	**39,299**	**8.7**

Source: Vectos, Lichfields and NEMS Household Shopper Survey – February 2017

7.26 Yeovil is the largest centre in terms of the retail turnover generated. The transport and parking characteristics of Yeovil will be slightly different to the other four settlements. The overall level of parking provision in Yeovil in terms of turnover per car parking space is much higher than the other four town centres., The average spend per visit is likely to be substantially higher in Yeovil,

although the average length of stay will also be longer. Yeovil has a higher proportion of customers who walk to the centre, which will reduce demand for car parking spaces. On balance one would expect Yeovil to have the highest turnover per car parking space.

7.27 The number of workers per space is higher in Yeovil (but to a lesser extent in Wincanton) than the other four settlements. Whilst this is offset by a greater proportion of non-car borne trips in Yeovil, it is likely that convenient commuter car parks in Yeovil experience high levels of demand during the week, and this demand may not be replicated in all car parks in Yeovil. Whilst the overall car parking provision in Yeovil appears broadly consistent with its size when compared with other centres, the balance of demand varies between car parks as demonstrated by the survey data.

7.28 The amount of retail floorspace and the number of people working in Wincanton per parking space is slightly higher than in Chard, Crewkerne and Ilminster. Wincanton may also experience higher levels of demand in conveniently located commuter car parks.

7.29 The level of parking provision in Chard, Crewkerne and Ilminster is broadly comparable in all three settlements in terms of turnover and workers per space and the proportion of non-car borne trips.

7.30 Respondents to the household survey were asked what improvements would make them shop more often in the main town centres. More car parking was mentioned by a relatively low number of respondents. The results for each centre were:

- Yeovil 4.7%
- Crewkerne 1.1%
- Ilminster 0.8%
- Chard 0.7%
- Wincanton 0.1%

7.31 These results correlate with the figures in Table 7.8, which suggest the level of car parking provision appears is to be more of an issue in Yeovil than the other centres.

Future Car parking Requirements

7.32 This study identifies floorspace projections for convenience and comparison goods retail floorspace up to 2034. If this additional floorspace is provided within or on the edge of town centres then the demand for car parking spaces is likely to increase. The proportional uplift in floorspace is shown in Table 7.9.

Table 7.9 Projected Uplift in Retail Floorspace 2017 to 2034

Centre	New Floorspace sq. m net	Estimated increase in Town Centre Retail Floorspace %
Yeovil	17,160	+33%
Wincanton	1,775	+34%
Chard	1,065	+13%
Crewkerne	1,035	+17%
Ilminster	316	+7%

Source: Table 12, Appendix 2 and Table 12, Appendix 3.

7.33 The demand for car parking spaces in town centres will not only be driven by the increase in retail floorspace. Indeed the increase in employment and other non-retail services will also

influence demand along with the future modal split for travel. For example the ageing population is expected to increase the use of public transport, the proportion walking to the centre and travel as passengers rather than drivers. The percentage increases shown in Table 7.9 should be viewed as the maximum potential increase in demand for car parking if the floorspace projections were accommodated within the town centres.

7.34 In terms of car parking standards (Zone A) within the Somerset County Council Parking Strategy, the floorspace projections for Yeovil suggest a need for 420 car parking spaces (59 spaces for convenience goods space, 307 spaces for comparison goods and 54 spaces for food and beverage space). This would represent an increase of 12.7% in current car parking provision. This represents a more realistic estimate than a figure based on the 34% uplift in retail floorspace in Yeovil.

7.35 In the other centres, the car parking standards based increase would be:

- Chard +40 spaces (+4.6%)
- Crewkerne +33 spaces (+6.4%)
- Ilminster +8 spaces (+2.3%)
- Wincanton +96 spaces (+37.5%)

7.36 The percentage increase in floorspace is relatively small within Chard and Ilminster and the car parking standards suggest a relatively small increase in car parking provision is required if surplus capacity does not currently exist.

7.37 Within Wincanton and Crewkerne 70% of the floorspace projection relates to convenience goods shopping, or 84% of the car parking standard figure. If a new food store was located within or on the edge of Wincanton town centre then the store would require its own customer car parking (around 80 spaces). The convenience goods projection in Crewkerne relates to the recent closure of the Budgen's store.

8.0 Summary and Conclusions

Introduction

8.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for the main centres in South Somerset. It explores how the identified growth across the District could be accommodated, the potential distribution of future development and the future policy approach for each town.

Meeting South Somerset's Need

8.2 The NPPF states that Local Planning Authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2034. When planning for growth in their town centres, Local Planning Authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

Convenience Goods Development

8.3 The quantitative assessment of the potential capacity for retail floorspace suggests that there is limited scope for new convenience goods development within South Somerset. The convenience goods projections suggest new floorspace could be distributed as shown in Table 8.1.

Table 8.1 Convenience Goods Floorspace Projections (Sq. m Gross)

Town	Additional Floorspace Sq. M Gross		
	2017 - 2024	2024 - 2034	Total
Yeovil	14	1,064	**1,078**
Chard	152	326	**478**
Crewkerne	504	107	**611**
Ilminster	0	0	**0**
Wincanton	1,740	282	**2,022**
Other South Somerset	1,513	505	**2,018**
TOTAL	**3,923**	**2,284**	**6,206**

Source: Table 12, Appendix 2.

8.5 In qualitative terms, food store and convenience retail provision is strong across the District and there are no obvious areas of deficiency in food store provision.

Comparison Goods Development

8.6 The comparison goods projections suggest new floorspace could be distributed as shown in Table 8.2. Comparison goods retail provision is reasonably strong in the District, particularly in Yeovil. However the clothing and footwear shopping offer is weaker in the District, as demonstrated by the high level of expenditure leakage for these types of goods. Yeovil will continue to be the main comparison shopping centre in South Somerset, providing a reasonable range of comparison shops. The other smaller centres have a more limited selection of comparison shops.

8.7 Residents also have the choice of visiting larger centres for higher order comparison goods shopping, particularly for clothing/fashion shopping. Taunton is reasonably accessible for residents in the west of the District.

Table 8.2 Comparison Goods Floorspace Projections (Sq. m Gross)

Town	Additional Floorspace Sq. M Gross		
	2017 - 2024	2024 - 2034	Total
Yeovil	5,755	15,753	**21,508**
Chard	264	710	**974**
Crewkerne	94	260	**354**
Ilminster	112	309	**421**
Wincanton	129	352	**481**
Other South Somerset	383	1,052	**1,435**
TOTAL	**6,738**	**18,435**	**25,173**

Source: Table 12, Appendix 3.

8.9 Investment will be needed in the District in order to retain existing levels of comparison goods expenditure. The objective of the development strategy for South Somerset should be to maintain the District's shopping role and market share within the sub-region. The projections in Table 8.2 assume that new development will retain the district's share of comparison expenditure in the study area and will help to maintain this share in the future.

Other Town Centre Uses

Food and Beverage

8.10 The food and beverage projections suggest new floorspace could be distributed as shown in Table 8.3. Towns in South Somerset generally have a small provision of food and beverage outlets with the proportion of restaurants/cafés (A3), pubs/bars (A4) and takeaways (A5) lower than the national average in most of the smaller town centres. Growth in expenditure should provide opportunities to improve food and beverage provision within all towns.

Table 8.3 Food and Beverage Floorspace Projections (Sq. m Gross)

Town	Additional Floorspace Sq. M Gross		
	2017 - 2024	2024 - 2034	Total
Yeovil	502	1,950	**2,452**
Chard	70	250	**320**
Crewkerne	15	58	**73**
Ilminster	20	81	**101**
Wincanton	76	291	**367**
Other South Somerset	213	834	**1,047**
TOTAL	**896**	**3,464**	**4,360**

Source: Table 12, Appendix 3.

Other Uses

8.11 South Somerset has a reasonable range of commercial leisure, entertainment and culture facilities, focused primarily in Yeovil. Residents also have access to facilities outside the district, including Taunton. Most of the key sectors are present in South Somerset e.g. cinemas, gyms, theatres, bingo and ten pin bowling. A summary of the key conclusions are set out below.

- There is theoretical capacity for a small boutique cinema (up to 5 screen cinema) in South Somerset District over the plan period.
- There is capacity for 3-5 health and fitness facilities/gym (approximately 50 to 100 stations each) in the District over the plan period.
- There may be scope for an additional small (3-5 lane) ten pin bowling alley in the area.

- There is theoretical scope for one further bingo facility in the District. However, the dispersed population in the District may make this theoretical potential unviable for operators.
- Projections indicate capacity for additional food and beverage outlets, indicating 896 sq. m gross could be supported by 2024, increasing to 2,650 sq. m gross by 2029 and 4,360 sq. m gross by 2034.
- In addition to the main leisure and entertainment uses other uses such as museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities could be appropriate over the plan period. The development strategy needs to be flexible and have the ability to response to emerging opportunities for new facilities of this kind.

Residential

8.12 In addition to the above, residential development can play an important role in ensuring the vitality of its centres and as such, it may be appropriate to encourage residential development on suitable sites to increase the amount of people living in and therefore supporting the town centre's services and facilities. A greater population could help to support the evening economy and particularly the food and drink sector that is currently lacking in many of the centres.

Accommodating Growth

8.13 The expenditure projections in this study take into account the growth of home shopping. This home shopping expenditure is excluded from the retail capacity projections. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth and the ageing population on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Therefore, growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. The ageing population may counter-balance the growth in home shopping.

8.14 The quantitative and qualitative assessment of the potential for new retail and leisure floorspace within the previous sections suggests there is scope for new development within South Somerset, particularly the latter part of the plan period, between 2029 and 2034. However these long term projections will need to be monitored and kept under review.

8.15 The global projections for the District up to 2024 suggest there is scope for around 11,500 sq. m gross of Class A1 to A5 floorspace. The long term projections up to 2034 suggest there is scope for about 35,700 sq. m gross of Class A1 to A5 floorspace.

8.16 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed and 1% per annum is adopted for food/beverage uses. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

8.17 There were 97 vacant shop units within the 5 main town centres and a further 31 vacant units in the 9 smaller centres, which equates to an overall vacancy rate of about 12.4%, which is slightly above the Goad national average (11.2%). Most of the vacant shop units are concentrated in Yeovil (63), Chard (13), Wincanton (14) and Somerton (14). Crewkerne has a large vacant unit following the closure of the Budgen's store (about 1,400 sq. m gross).

8.18 The short term priority should be the reoccupation of vacant floorspace in the town centres with a high vacancy rate. Vacant premises should help to accommodate growth, given their town centre location and the sequential preference for future investment. Based on existing vacancy levels in the main centre, there could be potential for re-occupied vacant space to accommodate the following new floorspace.

8.19 Healthy centres generally have a vacancy rate of less than 10%. This reflects the fact that there will always be an element of vacancies, reflecting the normal churn of occupiers. If the vacancy rate in the District can be reduced to 10%, assuming an average of 100 sq. m gross per unit (except for Yeovil where the floorspace of the vacant units is known) then the following reoccupied space could be achieved:

- Yeovil (16.9% vacancy) 3,600 sq. m gross (incl. the former BHS unit);
- Wincanton (18.9% vacancy) 650 sq. m gross;
- Chard (10.8% vacancy) 100 sq. m gross;
- Somerton (18.9%) 650 sq. m gross; and
- Other centres (combined) 100 sq. m gross.

8.20 Reoccupied vacant shop units could theoretically accommodate up to 5,100 sq. m gross. If this reduction in vacant units can be achieved then the overall Class A1 to A5 floorspace projection for the District up to 2034 would reduce from 35,700 sq. m gross to 30,600 sq. m gross. The vacancy figure of 10% has been used as an aspirational target that is slightly below the GOAD national average vacancy figure of 11.2%, and considered realistic in the circumstances of South Somerset (i.e. given the high levels of vacancy rates in some centres).

8.21 This theoretical exercise of meeting some of the projected floorspace by re-occupying town centre units is consistent with the sequential approach to locating town centre uses, as required by the NPPF. The reoccupation of the former BHS in Yeovil would represent a large proportion of the vacant floorspace in the town of Yeovil and, whilst the vacancy rate in Crewkerne is well below the national average, the reoccupation of the former Budgens (1,400 sq.m gross) should be a priority.

8.22 Notwithstanding this, it is also recognised that the scope to reduce vacancy rates is also dependent on the scale, nature and quality of existing empty units in centres, and the suitability to meet modern requirements. Whilst the Council should seek to direct new retail floorspace to existing centres (including vacant units) where possible, it should be recognised that the above figures are aspirational, and may not always be feasible in practice.

8.23 The application of shop frontage policies will protect the loss of vacant shop units and will help to encourage appropriate new uses. Long term vacant premises could be targeted and more actively marketed and shopfront/fit-out grants could be considered to assist reoccupation.

The Hierarchy and Strategy for Centres

8.24 The development plan should continue to identify the hierarchy of centres within South Somerset. The analysis and projection in this report suggests no changes to the current hierarchy are considered necessary. There have been limited changes since the current development plan was adopted in 2015. All the designated principal, market town, district and local centres perform important roles that should be maintained in order to meet the needs of residents.

8.25 Consistent with the sequential approach, the main town centres, i.e. Yeovil and the four market towns are expected to be the main focus for retail and leisure development. Yeovil has the best prospects for attracting investment from developers and multiple operators.

8.26 Large-scale development which serves a significant part of the District should be located in Yeovil. Smaller service and district centres should complement Yeovil, by providing for convenience food shopping and lower order day to day comparison shopping facilities and other services. The local centres should cater for top-up and basket convenience shopping and services, but are likely to provide a more limited range of comparison shopping.

8.27 Development plan policies should maintain the hierarchy of centres by:

1 permitting appropriate town centre uses in order to meet the needs of residents to accommodate growth;

2 focus retail, commercial leisure and entertainment uses within town centres (with retail uses focused within the Primary Shopping Areas and other town centre uses within the wider town centre boundaries;

3 restricting retail and other town centre uses outside the defined town centres where they fail the sequential approach or impact tests (see suggested impact thresholds below); and

4 continue to define primary retail frontages within the main centres to retain an appropriate mix of uses and a predominance of Class A1 retail use within the prime pitch (see boundaries and frontages below).

Yeovil

8.28 Analysis of Yeovil is provided in Appendix 5(A) and Appendix 7 of this report.

8.29 As the Principal centre, Yeovil has the largest retail provision in terms of sales floorspace and number of units in the District. Over 45% of the town retail floorspace is located out of centre i.e. retail warehouses and food stores. Yeovil has the best prospects for attracting multiple operators to the District in the future.

8.30 The town centre has a good proportion of comparison, convenience and service units. The vacancy level is above the national average (16.9% compared to 11.2%). The number of A3 units is slightly lower than the national average and there is considered to be a lack of restaurants and evening uses within the town centre. Convenience retailing is dominated by the town centre Tesco Extra and the out of centre Asda, Morrison's and Lidl stores. The choice of food and grocery shopping is relatively limited, and is dominated by Tesco Extra.

8.31 Yeovil (Zone 1) retains a very high proportion of convenience (92%) and there is limited potential to increase its market share, without reducing the share of other centres within the District. Yeovil also retains a relatively high proportion of comparison (78%) and food/beverage (73%) expenditure.

8.32 Yeovil is likely to be the main focus for new town centre uses and should continue to be designated at the top of the retail hierarchy in South Somerset to maintain its important role. The floorspace projections for Class A retail/food and beverage are shown in Table 8.3.

Table 8.3 Yeovil Floorspace Projections (Sq. M Gross)

Type	2024	2029	2034
Convenience	14	555	1,078
Comparison	5,755	13,561	21,508
Food and Beverage	502	1,489	2,452
Total	**6,271**	**15,605**	**25,038**

Source: Lichfields Analysis (Tables 12, Appendix 2, 3 and 4)

8.33 If car parking standards are applied, then floorspace projections for Yeovil would generate a requirement for 420 additional car parking spaces.

8.34 As indicated above, the vacancy rate in Yeovil town centre is relatively high and the future strategy should seek to reduce this vacancy rate. On the basis that vacancy rates can be reduced to a theoretical 10%, then vacant units within Yeovil town centre could accommodate up to 3,600 sq. m gross, which if achieved, accounts for around a fifth of the medium term floorspace projection up to 2029.

8.35 If this reduction in vacancy rate can be achieved, then further sites to accommodate around 12,000 sq. m gross should to be identified up to 2029, and possibly a further 9,400 sq. m gross between 2029 and 2034. If the reduction in vacancy rate cannot be achieved then sites to accommodate the full figures shown in Table 8.3 should be identified.

8.36 A review of potential development sites has identified 9 opportunities within or on the edge of Yeovil town centre (see Appendix 7), as follows:

1	Cattle Market	- Good potential (for town centre uses including food retailing);
2	Quedam Extension	- Good potential;
3	Glovers Walk	- Reasonable potential;
4	Box Factory	- Reasonable potential;
5	Stars Lane car park	- Poor potential due to loss of parking;
6	Olds Garage	- Good potential (subject to impact/sequential tests);
7	Petters Way car park	- Poor potential due to loss of parking;
8	West Hendford car park	- Poor potential; and
9	Bus Depot	- Reasonable potential.

8.37 Several of the sites are surface car parks and replacement car parking may need to be provided, either on-site or elsewhere. In terms of potential capacity, the sites with “good” or “reasonable” potential, if delivered could accommodate an uplift of around 18,500 sq. m gross. A number of sites could deliver additional floorspace in the short term (next 5 years), i.e. the Cattle Market (circa 10,000 sq. m gross), Quedam Extension (2,000 sq. m), Olds Garage (circa 2,000 sq. m), and the bus depot (1,000 sq. m). These sites along with vacant shop floorspace would be more than sufficient to meet the medium term projections up to and beyond 2029. Longer term redevelopment opportunities are considered to be Glovers Walk and the Box Factory.

8.38 Given the scale of floorspace within Yeovil town centre and the floorspace projections, there is no need to reduce the impact assessment threshold from 2,500 sq. m gross as set out in paragraph 26 of the NPPF.

Chard

8.39 Chard is the second largest retail centre in the District with 120 retail units (Class A1-A5). It has a good range of comparison and convenience shops anchored by Lidl and Sainsbury’s. Chard is considered to be a healthy town centre. It has a higher than average proportion of A1 service and A2 service uses but a relatively poor A3 offer.

8.40 Chard (Zone 6) retains a very high proportion (86%) of convenience goods expenditure but a much lower proportion for comparison goods (21%) and food/beverage expenditure (45%). The Class A retail/food and beverage projections are shown in Table 8.4.

Table 8.4 Chard Floorspace Projections (Sq. m Gross)

Type	2024	2029	2034
Convenience	152	319	478
Comparison	264	616	974
Food and Beverage	70	197	320
Total	**486**	**1,132**	**1,772**

Source: Lichfields Analysis (Tables 12, Appendix 2, 3 and 4)

8.41 If car parking standards are applied, then floorspace projections for Chard would generate a requirement for 40 additional car parking spaces.

8.42 Whilst the vacancy rate is below the national average, vacant units within Chard town centre might reasonably accommodate around 100 sq. m of the projected floorspace. A review of potential development sites has identified three opportunities within or on the edge of Chard town centre (see Appendix 7), as follows:

1 East Street - Reasonable potential (for town centre uses);

2 Land between A358 and Silver St. - Reasonable potential; and

3 Boden Mill and surrounding area - Good potential.

8.43 Boden Mill is located within the town centre boundary and may have the best prospects for delivering additional floorspace in the short to medium term. The site could accommodate small scale expansion of town centre shop units or a medium scale development (2,000 sq. m) if a more comprehensive development is delivered. With vacant shop units this site would be more than sufficient to meet the long term floorspace projection over the plan period.

8.44 In terms of scale of development, retail proposals of 2,500 sq. m gross would be significant in relation to the scale of existing retail provision in Chard town centre, and it would exceed the projected floorspace for Chard up to 2034 by 38%. The town centre will be vulnerable to impacts of development under 2,500 sq. m gross. The 750 sq. m locally set impact threshold set out in the Local Plan remains appropriate for this town centre.

Crewkerne

8.45 Crewkerne is the third largest retail centre in the District after Yeovil and Chard comprising 98 commercial units. It has a strong convenience goods offer including Waitrose, Lidl and Cooperative alongside other smaller units. There is a range of comparison goods retailers within the centre, albeit there is a relatively high number of charity shops and very few national multiples. There are a variety of service uses, including hairdressers, accountants, restaurants and solicitors. Crewkerne (Zone 4) retains a relatively low proportion of convenience goods (35%) and also a low proportion of comparison goods (5%). The food and beverage leisure retention rate is 8%. The floorspace projections for Class A retail/food and beverage are shown in Table 8.5.

Table 8.5 Crewkerne Floorspace Projections (Sq. m Gross)

Type	2024	2029	2034
Convenience	504	584	661
Comparison	94	223	354
Food and Beverage	15	44	73
Total	**613**	**851**	**1,088**

Source: Lichfields Analysis (Tables 12, Appendix 2, 3 and 4)

8.46 If car parking standards are applied, then floorspace projections for Crewkerne would generate a requirement for 33 additional car parking spaces.

8.47 The reoccupation/or redevelopment of the former Budgen's food store could accommodate this floorspace projection. A review of potential development sites has identified only one opportunity within Crewkerne (see Appendix 7). The edge of centre land between Henhayes and Orchard is not well connected with the town centre and lacks road frontage. Its development potential for town centre uses is considered to be poor.

8.48 Given the very limited projected growth in floorspace in the centre, projected demand in Crewkerne could be met by small in-fill developments, and/or shop extensions including the use of upper floors.

8.49 In terms of scale of development, retail proposals of much smaller than 2,500 sq. m gross within Crewkerne would be significant in relation to the scale of existing retail provision in the town centre, and given that there is only very limited projected growth in floorspace up to 2034 the NPPF impact threshold of 2,500 sq. m is inappropriate. The town centre will be vulnerable to impacts of development under 2,500 sq. m gross and thus, based on the floorspace projections, the local impact threshold of 750 sq. m gross remains appropriate.

Ilminster

8.50 Ilminster is a Market Town which has 69 retail units, making it the smallest of the Market Towns. The town centre is healthy with a strong comparison and convenience goods offer. There are only two vacant units which represent a very low vacancy rate of 2.9%. The centre benefits from a large Tesco Superstore within the town centre with a good pedestrian link to Silver Street/East Street via Ditton Street. Visitors to the centre are able to combine their visit to the Tesco with the town centre due to the 3 hour free parking at the Tesco car park.

8.51 Ilminster (Zone 5) retains a moderate amount of its convenience goods expenditure (40%), comparison goods expenditure (10%) and food and beverage expenditure (16%). These low figures are attributed to access to facilities in Taunton and Yeovil. Yeovil attracts 29% of convenience goods expenditure from Zone 4 (Crewkerne Area) whilst Taunton attracts 16%. The figures can also partly be attributed to the number of units within Ilminster and the limited choice of shops. The floorspace projections for Class A retail/food and beverage are shown in Table 8.6.

Table 8.6 Ilminster Floorspace Projections (Sq. m Gross)

Type	2024	2029	2034
Convenience	-	-	-
Comparison	112	265	421
Food and Beverage	20	61	101
Total	**132**	**326**	**522**

Source: Lichfields (Tables 12, Appendix 2, 3 and 4)

8.52 If car parking standards are applied, then floorspace projections for Ilminster would generate a requirement for only 8 additional car parking spaces.

8.53 A review of potential development sites has identified only two small opportunities within Ilminster (see Appendix 7) i.e. former Housego building and Swan Precinct. Given the limited projected growth in floorspace in the centre, projected demand in Ilminster could be met by these opportunities plus other small in-fill developments and/or shop extensions including the use of upper floors.

8.54 In terms of scale of development, retail proposals of much smaller than 2,500 sq. m gross within Ilminster would be significant in relation to the scale of existing retail provision in the town centre, and given that there is only very limited projected growth in floorspace up to 2034 the NPPF impact threshold of 2,500 sq. m is inappropriate. The town centre will be vulnerable to impacts of development under 2,500 sq. m gross and thus, based on the floorspace projections, the local impact threshold of 750 sq. m gross remains appropriate.

Wincanton

8.55 Wincanton is designated as a Market Town and it is the second smallest in terms of number of units. It comprises 74 retail units, 14 of which are currently vacant, representing a high vacancy rate of 18.9%. The convenience offer is limited within the town centre but there is a Morrison's and Lidl store outside the town centre. The comparison offer appears to be consistent with the UK average. A residential development to the west of Wincanton was granted in 2007 (05/00960/OUT). The reserved matters application confirms that four small retail units will be included in this development. The new retail units will primarily serve the new community, but will reduce the potential for new retail uses within the town centre.

8.56 Wincanton (Zone 2) retains a moderate amount of convenience expenditure (42%) and a very low amount of comparison expenditure (6%). Food/beverage retention expenditure within Zone 2 is 22%. The main competing convenience centre appears to be Gillingham which is also in Zone 2 (Wincanton Area) but located in the Local Authority of North Dorset. Gillingham is approximately 7.5 miles away from Wincanton and attracts 28% of the convenience expenditure within Zone 2 (Wincanton Area). Gillingham includes a Waitrose, Asda, Lidl, Cooperative and Iceland. In terms of comparison goods, 50% of respondents in Zone 2 (Wincanton Area) purchase comparison goods in Yeovil. The floorspace projections for Class A retail/food and beverage are shown in Table 8.7.

Table 8.7 Wincanton Projected Floorspace (Sq. Gross)

Type	2024	2029	2034
Convenience	1,740	1,884	2,022
Comparison	129	304	481
Food and Beverage	76	224	367
Total	**1,945**	**2,412**	**2,870**

Source: Lichfields (Tables 12, Appendix 2, 3 and 4)

8.57 If car parking standards are applied then the floorspace projections for Wincanton suggest a need for 96 additional car parking spaces. There is a relatively high projected convenience goods floorspace within Wincanton. Whilst the re-occupation of some vacant units could accommodate some of this growth (about 650 sq. m gross), sites for further development may be required. A review of potential development sites has identified 6 opportunities within Wincanton, as follows:

1 Travis Perkins Site - Reasonable potential (for town centre uses);

2 Land between Church St. and Car Park - Reasonable potential;

3 Carrington Way Car Park - Poor potential due to loss of parking;

4 Vedler's Hey - Poor potential;

5 Memorial Hall Car Park - Poor potential due to loss of parking; and

6 The Tything - Poor potential.

8.58 A number of these sites are either in use as car parks and/or are back-land sites where access and lack of main road frontage will restrict their potential for retail and main town centre uses. The availability of the Travis Perkins, site is unclear and this use already makes a contribution to Wincanton's attraction as a centre. 'Land between Church Street and Car Park' may have the best potential within the town centre if the library site becomes available or is relocated. Alongside reoccupation of the vacant shop units, this site could accommodate most of the floorspace projections up 2029. However accommodating the convenience goods floorspace projection in the form of a large food store within the town centre does not appear to be feasible at this stage.

8.59 Given the size of Wincanton town centre and the floorspace projection, the 750 sq. m floorspace threshold for impact assessments remains appropriate.

District and Local Centres

8.60 The 3 District and 6 Local Centres generally have small projected increases in retail/food and beverage floorspace, reflecting their current role within the hierarchy. The global floorspace projections for Class A retail/food and beverage uses in these centres is shown in Table 8.8.

Table 8.8 District and Local Centre Projected Floorspace (Sq. M Gross)

Type	2024	2029	2034
Convenience*	1,513	1,744	2,018
Comparison	383	904	1,435
Food and Beverage	213	635	1,047
Total	**2,109**	**3,283**	**4,500**

* reduced to offset over-supply in Ilminster.

8.61 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan, which indicates the large town centres will be the focal point for new retail development in the District, and additional floorspace within other centres is expected to be limited. This approach should be adopted in the Local Plan 2034.

8.62 Vacant shop units could accommodate some of the short term floorspace projection up to 2024. Development within smaller centres/villages is likely to be small in-fill development, shop extensions and expansion into upper floors.

Policy Review

Policy EP9 – Retail Hierarchy

8.63 The approach set out in Policy EP9 is consistent with the NPPF and the development plan should continue to identify the hierarchy of centres and ensure new main town uses are focused within these town centres. Policy EP9 could be better linked to other policies relating to retail floorspace capacity and impact thresholds in order to provide more guidance on what scale of development is likely to be commensurate with the settlement role. Policy EP9 should also make it clear that the Local Plan objective is to maintain the vitality and viability of the centres identified within the hierarchy, which is linked to Policy EP11. Based on the scale of facilities available within each settlement and the retail floorspace projections in this study, the current retail hierarchy remains appropriate and no changes are required.

Policy EP10 – Convenience and Comparison Shopping in Yeovil

8.64 Policy EP10 will need to be updated in line with the revised retail capacity assessment within this report as set out in Tables 8.1 to 8.3. The Council should consider whether Policy EP10 should be expanded to include floorspace projections for other towns. Due to uncertainties regarding long term growth, Policy EP10 could provide indicative floorspace projections, rather than upper floorspace limits. A schedule of indicative floorspace projections could be included within the policy or supporting text.

Policy EP11 – The Sequential Approach

8.65 Policy EP11 is consistent with the NPPF in terms of the sequential approach, PSA and town centre boundary definitions. A small number of amendments should be considered, as follows:

1 the Ilminster town centre boundary could be expanded to include the whole Tesco store;

2 the primary shopping areas in the four Market Towns could be deleted and the town centre boundary could be used as the policy basis for applying the sequential approach;

3 peripheral areas in Yeovil that are predominantly residential uses on the south side of Summer House Terrace and north of the Tesco store could be excluded from the town centre boundary; and

4 The areas north and east of Central Road in Yeovil could be excluded from the Primary Shopping Area.

Policy EP12 – Impact Thresholds

8.66 The impact threshold in the NPPF (over 2,500 sq. m gross) remains disproportionate in relation to the existing scale of most town centres within South Somerset. The impact of smaller development should continue to be considered in line with Policy EP12.

Policy EP13 – Protection of Retail Frontages

8.67 The NPPF provides limited guidance on the definition of primary and secondary frontages, or how policy should seek to balance diversity and the need to maintain retail uses in town centres. Policy EP13 was adopted after the NPPF was published and the approach is considered to be appropriate although 'Criterion 4' could be strengthened by a minor amendment, as follows:

"The character and nature of the use proposed, including the level of pedestrian activity associated with it <u>and its contribution to the vitality and viability of the centre</u>."

8.68 Lichfields' review of the Primary Frontage suggests the following minor amendments should considered:

1 There is scope to expand the primary frontage along the pedestrianised part of Hendford and along Westminster Street in Yeovil;

2 Within Crewkerne the primary frontages could be extended to include all parts of Market Street, where there are a number of Class A1 uses; and

3 Primary Frontage could be identified for Wincanton to protect the retail core along the High Street from Wincanton Methodist Church in the east to the Town Hall in the west.

Policy EP14 – Neighbourhood Centres

8.69 Neighbourhood centres are small parades of shops and fall below Local Centres within the hierarchy and would not be considered to be town centres in policy terms. The supporting text to Policy EP14 could be amended to clarify this definition. Policy EP14 could also be cross

referenced with Policies EP11 and EP12. Policy EP12 indicates that out of centre development of over 250 sq. m gross will be required to assess retail impact. This figure could also be an appropriate threshold where development above 250 sq. m gross should consider sequential sites within the nearest town, district or local centre.

Policy EP15 – Local Shops, Community Facilities and Services

8.70 Access to facilities will become increasingly important and the approach within Policy EP15 should be maintained.

Future Monitoring

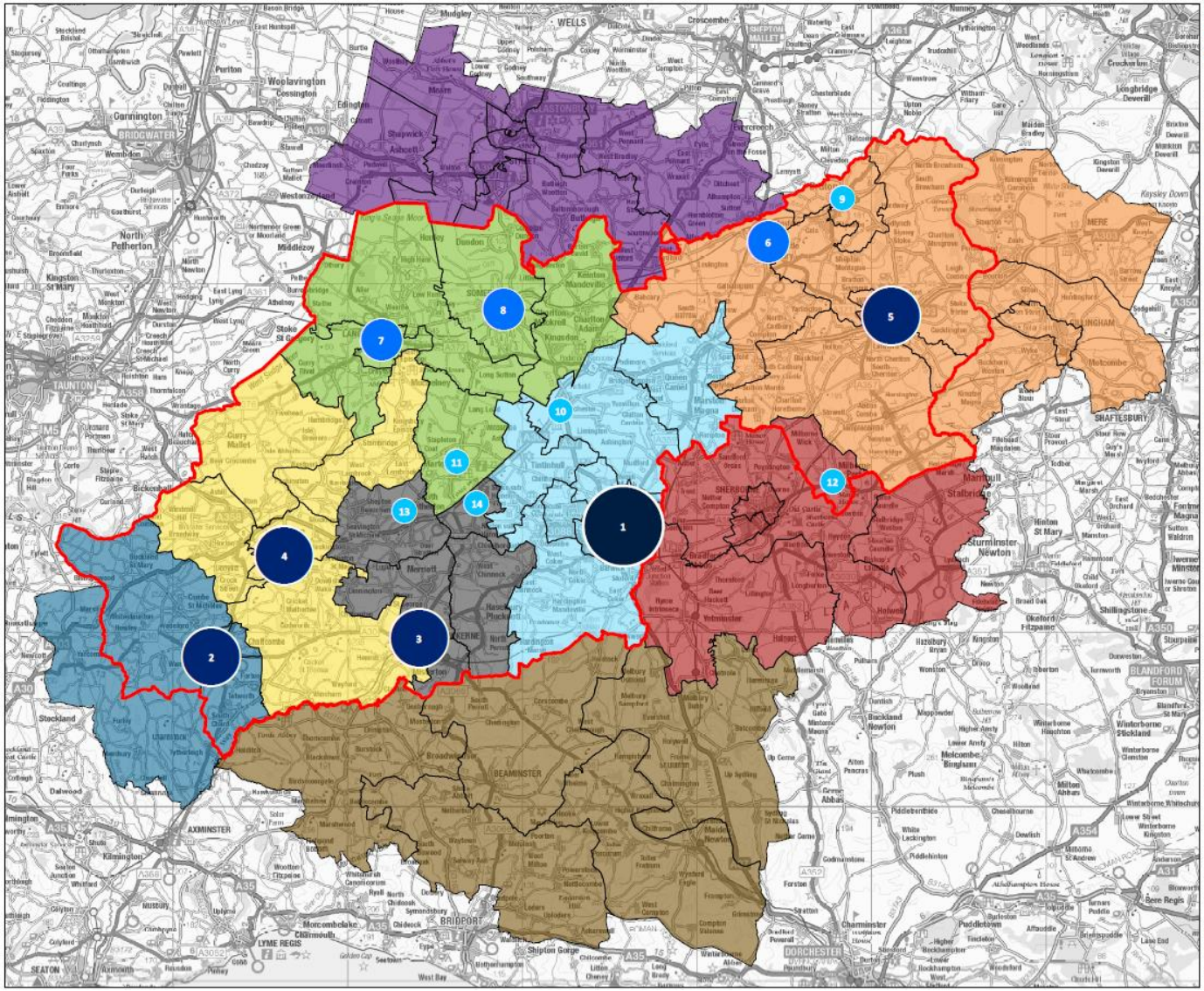
8.71 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the short to medium term up to 2024, with longer term forecasts up to 2034.

8.72 Floorspace capacity forecasts may need to be updated as the Council continues to prepare the Early Review Local Plan. Indeed, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections after 2024 should be treated with caution. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

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

8.73 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1: Study Area



Key

South Somerset Local Authority Boundary

Ward Boundary

Survey Zones:

- Zone 1: Yeovil Area
- Zone 2: Wincanton Area
- Zone 3: Somerton/ Langport Area
- Zone 4: Crewkerne Area
- Zone 5: Ilminster Area
- Zone 6: Chard Area
- Zone 7: Beaminster Area
- Zone 8: Sherborne Area
- Zone 9: Glastonbury Area

Centres:

Principal Centre
1 Yeovil

Market Towns
2 Chard
3 Crewkerne
4 Ilminster
5 Wincanton

District Centres
6 Ansford/Castle Cary
7 Langport/Huish Episcopi
8 Somerton

Local Centres
9 Bruton
10 Ilchester
11 Martock
12 Milborne Port
13 South Petherton
14 Stoke sub Hamdon

LICHFIELDS

Project	South Somerset Retail Study
Title	Survey Zones & Centres
Client	South Somerset District Council
Date	02.05.2017
Scale	1 : 200,000 @ A3
Drawn by	MAR
Drg. No	GIS\WE\31465\01-03

N

GIS Reference: S:\WE31465 - South Somerset Retail Study\WE31465 - South Somerset Retail Study - Survey Zones & Centres - 01.03.2017.mxd

Appendix 2: Convenience Assessment

Table 1 **Study Area Population**

Zone	2011	2017	2019	2024	2029	2034
Zone 1 - Yeovil	60,559	62,775	63,452	65,217	66,795	68,185
Zone 2 - Wincanton	40,778	42,276	42,733	43,946	45,021	45,964
Zone 3 - Langport/Somerton	22,360	23,178	23,428	24,080	24,663	25,176
Zone 4 - Crewkerne	20,160	20,898	21,123	21,711	22,236	22,699
Zone 5 - Ilminster	15,721	16,296	16,472	16,930	17,340	17,701
Zone 6 - Chard	20,429	21,278	21,545	22,248	22,900	23,471
Zone 7 - West Dorset	15,247	15,585	15,738	16,184	16,583	16,936
Zone 8 - Sherborne	22,908	23,776	24,043	24,845	25,513	26,080
Zone 9 - Street	29,785	30,657	31,011	31,992	32,919	33,736
Total	**247,947**	**256,720**	**259,546**	**267,153**	**273,969**	**279,949**

Sources: *Experian 2011 Census of Population*
Office of National Statistics 2014 SNPP projections

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

Zone	2017	2019	2024	2029	2034
Zone 1 - Yeovil	2,058	2,031	2,016	2,015	2,019
Zone 2 - Wincanton	2,224	2,195	2,179	2,178	2,182
Zone 3 - Langport/Somerton	2,289	2,259	2,242	2,242	2,246
Zone 4 - Crewkerne	2,232	2,202	2,186	2,186	2,190
Zone 5 - Ilminster	2,323	2,293	2,276	2,276	2,280
Zone 6 - Chard	2,142	2,114	2,098	2,098	2,102
Zone 7 - West Dorset	2,485	2,452	2,434	2,434	2,438
Zone 8 - Sherborne	2,239	2,210	2,194	2,193	2,197
Zone 9 - Street	2,080	2,053	2,038	2,037	2,041

Sources:
Experian Local Expenditure 2015 (2015 prices)
Growth Rates:-0% 2015-2016,-0.2% 2016-2017, -0.9% 2017 to 2018, 0% p.a. from 2019 to 2023 and 0.1% from 2024
Excludes Special Forms of Trading

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

Zone	2017	2019	2024	2029	2034
Zone 1 - Yeovil	129.17	128.86	131.47	134.62	137.68
Zone 2 - Wincanton	94.02	93.79	95.75	98.06	100.30
Zone 3 - Langport/Somerton	53.05	52.92	53.99	55.28	56.54
Zone 4 - Crewkerne	46.64	46.52	47.47	48.60	49.71
Zone 5 - Ilminster	37.86	37.77	38.54	39.46	40.35
Zone 6 - Chard	45.57	45.54	46.68	48.04	49.33
Zone 7 - West Dorset	38.72	38.59	39.40	40.36	41.29
Zone 8 - Sherborne	53.24	53.14	54.51	55.96	57.31
Zone 9 - Street	63.76	63.66	65.19	67.06	68.85
Study Area Total	**562.04**	**560.78**	**572.99**	**587.45**	**601.36**

Source: Tables 1 and 2

Table 4 **Base Year 2017 Convenience Goods Market Shares (%)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Yeovil town centre	27.5%	2.8%	12.8%	4.7%	0.6%	0.7%	3.8%	7.8%	0.2%
Yeovil other	64.5%	0.7%	9.4%	23.8%	8.1%	3.7%	13.3%	21.1%	0.0%
Chard	0.0%	0.0%	0.0%	0.5%	11.3%	86.0%	5.8%	0.0%	0.0%
Crewkerne	0.4%	0.0%	1.5%	35.3%	8.0%	1.3%	11.8%	0.0%	0.0%
Ilminster	0.0%	0.0%	0.0%	5.7%	40.7%	0.6%	0.4%	0.0%	0.0%
Langport	0.6%	0.0%	23.1%	0.4%	7.2%	0.0%	0.0%	0.0%	0.0%
Somerton	0.0%	0.0%	15.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Wincanton	0.2%	42.5%	0.3%	0.0%	0.0%	0.0%	0.0%	9.9%	0.3%
Castle Cary	0.3%	6.2%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	2.3%
Martock	0.0%	0.0%	8.9%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%
Illchester	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other South Somerset	1.2%	0.9%	3.0%	24.5%	2.8%	0.0%	3.9%	0.4%	0.3%
South Somerset Total	**94.9%**	**53.1%**	**74.7%**	**94.9%**	**80.4%**	**92.3%**	**39.0%**	**39.2%**	**3.8%**
Axminster	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%
Bridport	0.0%	0.0%	0.0%	0.4%	0.3%	0.0%	38.9%	0.0%	0.0%
Bridgwater	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Dorcester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.7%	0.0%
Exeter	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gillingham	0.1%	28.2%	0.2%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%
Honiton	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.0%	0.0%	0.0%
Shepton Mallet	0.2%	4.8%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	11.2%
Sherborne	2.4%	3.2%	0.2%	3.6%	0.0%	0.0%	3.4%	55.9%	0.0%
Street/Glastonbury	0.0%	0.5%	18.4%	0.2%	0.0%	0.0%	0.0%	0.0%	76.0%
Taunton	0.1%	0.0%	4.4%	0.9%	16.1%	3.8%	0.0%	0.0%	0.0%
Wells	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%
Other Outside S. Somerset	2.0%	10.2%	0.2%	0.0%	2.7%	0.6%	16.0%	3.1%	4.8%
Other Sub-Total	**5.1%**	**46.9%**	**25.3%**	**5.1%**	**19.6%**	**7.7%**	**61.0%**	**60.8%**	**96.2%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey February 2017 (weighted results)

Table 5 **Base Year 2017 Convenience Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2017	**129.17**	**94.02**	**53.05**	**46.64**	**37.86**	**45.57**	**38.72**	**53.24**	**63.76**	**562.04**
Yeovil town centre	35.52	2.63	6.79	2.19	0.23	0.32	1.47	4.15	0.13	53.44
Yeovil other	83.32	0.66	4.99	11.10	3.07	1.69	5.15	11.23	0.00	121.20
Chard	0.00	0.00	0.00	0.23	4.28	39.19	2.25	0.00	0.00	45.95
Crewkerne	0.52	0.00	0.80	16.46	3.03	0.59	4.57	0.00	0.00	25.97
Ilminster	0.00	0.00	0.00	2.66	15.41	0.27	0.15	0.00	0.00	18.50
Langport	0.78	0.00	12.25	0.19	2.73	0.00	0.00	0.00	0.00	15.94
Somerton	0.00	0.00	8.33	0.00	0.00	0.00	0.00	0.00	0.45	8.77
Wincanton	0.26	39.96	0.16	0.00	0.00	0.00	0.00	5.27	0.19	45.84
Castle Cary	0.39	5.83	0.00	0.00	0.11	0.00	0.00	0.00	1.47	7.80
Martock	0.00	0.00	4.72	0.00	0.53	0.00	0.00	0.00	0.00	5.25
Illchester	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Other South Somerset	1.55	0.85	1.59	11.43	1.06	0.00	1.51	0.21	0.19	18.39
South Somerset Total	**122.59**	**49.92**	**39.63**	**44.26**	**30.44**	**42.06**	**15.10**	**20.87**	**2.42**	**367.29**
Axminster	0.00	0.00	0.00	0.00	0.00	1.32	0.00	0.00	0.00	1.32
Bridport	0.00	0.00	0.00	0.19	0.11	0.00	15.06	0.00	0.00	15.36
Bridgwater	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.70	0.86
Dorcester	0.00	0.00	0.00	0.00	0.00	0.00	1.05	0.37	0.00	1.42
Exeter	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39
Gillingham	0.13	26.51	0.11	0.00	0.00	0.00	0.00	0.59	0.00	27.33
Honiton	0.00	0.00	0.00	0.00	0.19	0.18	0.00	0.00	0.00	0.37
Shepton Mallet	0.26	4.51	0.37	0.00	0.00	0.00	0.00	0.00	7.14	12.28
Sherborne	3.10	3.01	0.11	1.68	0.00	0.00	1.32	29.76	0.00	38.97
Street/Glastonbury	0.00	0.47	9.76	0.09	0.00	0.00	0.00	0.00	48.46	58.78
Taunton	0.13	0.00	2.33	0.42	6.10	1.73	0.00	0.00	0.00	10.71
Wells	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.00	1.98	2.45
Other Outside S. Somerset	2.58	9.59	0.11	0.00	1.02	0.27	6.20	1.65	3.06	24.48
Other Sub-Total	**6.59**	**44.09**	**13.42**	**2.38**	**7.42**	**3.51**	**23.62**	**32.37**	**61.34**	**194.75**
TOTAL	**129.17**	**94.02**	**53.05**	**46.64**	**37.86**	**45.57**	**38.72**	**53.24**	**63.76**	**562.04**

Source: Table 3 and 4

Table 6 **2019 Convenience Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2019	**128.86**	**93.79**	**52.92**	**46.52**	**37.77**	**45.54**	**38.59**	**53.14**	**63.66**	**560.78**
Yeovil town centre	35.44	2.63	6.77	2.19	0.23	0.32	1.47	4.14	0.13	53.30
Yeovil other	83.11	0.66	4.97	11.07	3.06	1.68	5.13	11.21	0.00	120.90
Chard	0.00	0.00	0.00	0.23	4.27	39.16	2.24	0.00	0.00	45.90
Crewkerne	0.52	0.00	0.79	16.42	3.02	0.59	4.55	0.00	0.00	25.90
Ilminster	0.00	0.00	0.00	2.65	15.37	0.27	0.15	0.00	0.00	18.45
Langport	0.77	0.00	12.22	0.19	2.72	0.00	0.00	0.00	0.00	15.90
Somerton	0.00	0.00	8.31	0.00	0.00	0.00	0.00	0.00	0.45	8.75
Wincanton	0.26	39.86	0.16	0.00	0.00	0.00	0.00	5.26	0.19	45.73
Castle Cary	0.39	5.81	0.00	0.00	0.11	0.00	0.00	0.00	1.46	7.78
Martock	0.00	0.00	4.71	0.00	0.53	0.00	0.00	0.00	0.00	5.24
Illchester	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Other South Somerset	1.55	0.84	1.59	11.40	1.06	0.00	1.51	0.21	0.19	18.34
South Somerset Total	**122.28**	**49.80**	**39.53**	**44.15**	**30.37**	**42.03**	**15.05**	**20.83**	**2.42**	**366.46**
Axminster	0.00	0.00	0.00	0.00	0.00	1.32	0.00	0.00	0.00	1.32
Bridport	0.00	0.00	0.00	0.19	0.11	0.00	15.01	0.00	0.00	15.31
Bridgwater	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.70	0.86
Dorcester	0.00	0.00	0.00	0.00	0.00	0.00	1.04	0.37	0.00	1.41
Exeter	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39
Gillingham	0.13	26.45	0.11	0.00	0.00	0.00	0.00	0.58	0.00	27.27
Honiton	0.00	0.00	0.00	0.00	0.19	0.18	0.00	0.00	0.00	0.37
Shepton Mallet	0.26	4.50	0.37	0.00	0.00	0.00	0.00	0.00	7.13	12.26
Sherborne	3.09	3.00	0.11	1.67	0.00	0.00	1.31	29.70	0.00	38.89
Street/Glastonbury	0.00	0.47	9.74	0.09	0.00	0.00	0.00	0.00	48.38	58.68
Taunton	0.13	0.00	2.33	0.42	6.08	1.73	0.00	0.00	0.00	10.69
Wells	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.00	1.97	2.45
Other Outside S. Somerset	2.58	9.57	0.11	0.00	1.02	0.27	6.17	1.65	3.06	24.42
Other Sub-Total	**6.57**	**43.99**	**13.39**	**2.37**	**7.40**	**3.51**	**23.54**	**32.31**	**61.24**	**194.31**
TOTAL	**128.86**	**93.79**	**52.92**	**46.52**	**37.77**	**45.54**	**38.59**	**53.14**	**63.66**	**560.78**

Source: Table 3 and 4

Table 7 **2024 Convenience Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2024	**131.47**	**95.75**	**53.99**	**47.47**	**38.54**	**46.68**	**39.40**	**54.51**	**65.19**	**572.99**
Yeovil town centre	36.16	2.68	6.91	2.23	0.23	0.33	1.50	4.25	0.13	54.41
Yeovil other	84.80	0.67	5.08	11.30	3.12	1.73	5.24	11.50	0.00	123.43
Chard	0.00	0.00	0.00	0.24	4.35	40.15	2.28	0.00	0.00	47.02
Crewkerne	0.53	0.00	0.81	16.76	3.08	0.61	4.65	0.00	0.00	26.43
Ilminster	0.00	0.00	0.00	2.71	15.68	0.28	0.16	0.00	0.00	18.83
Langport	0.79	0.00	12.47	0.19	2.77	0.00	0.00	0.00	0.00	16.23
Somerton	0.00	0.00	8.48	0.00	0.00	0.00	0.00	0.00	0.46	8.93
Wincanton	0.26	40.69	0.16	0.00	0.00	0.00	0.00	5.40	0.20	46.71
Castle Cary	0.39	5.94	0.00	0.00	0.12	0.00	0.00	0.00	1.50	7.95
Martock	0.00	0.00	4.81	0.00	0.54	0.00	0.00	0.00	0.00	5.34
Illchester	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Other South Somerset	1.58	0.86	1.62	11.63	1.08	0.00	1.54	0.22	0.20	18.72
South Somerset Total	**124.77**	**50.84**	**40.33**	**45.05**	**30.98**	**43.09**	**15.36**	**21.37**	**2.48**	**374.26**
Axminster	0.00	0.00	0.00	0.00	0.00	1.35	0.00	0.00	0.00	1.35
Bridport	0.00	0.00	0.00	0.19	0.12	0.00	15.32	0.00	0.00	15.63
Bridgwater	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.72	0.88
Dorcester	0.00	0.00	0.00	0.00	0.00	0.00	1.06	0.38	0.00	1.45
Exeter	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39
Gillingham	0.13	27.00	0.11	0.00	0.00	0.00	0.00	0.60	0.00	27.84
Honiton	0.00	0.00	0.00	0.00	0.19	0.19	0.00	0.00	0.00	0.38
Shepton Mallet	0.26	4.60	0.38	0.00	0.00	0.00	0.00	0.00	7.30	12.54
Sherborne	3.16	3.06	0.11	1.71	0.00	0.00	1.34	30.47	0.00	39.84
Street/Glastonbury	0.00	0.48	9.93	0.09	0.00	0.00	0.00	0.00	49.54	60.05
Taunton	0.13	0.00	2.38	0.43	6.20	1.77	0.00	0.00	0.00	10.91
Wells	0.00	0.00	0.49	0.00	0.00	0.00	0.00	0.00	2.02	2.51
Other Outside S. Somerset	2.63	9.77	0.11	0.00	1.04	0.28	6.30	1.69	3.13	24.95
Other Sub-Total	**6.71**	**44.90**	**13.66**	**2.42**	**7.55**	**3.59**	**24.03**	**33.14**	**62.71**	**198.72**
TOTAL	**131.47**	**95.75**	**53.99**	**47.47**	**38.54**	**46.68**	**39.40**	**54.51**	**65.19**	**572.99**

Source: Table 3 and 4

Table 8 **2029 Convenience Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2029	**134.62**	**98.06**	**55.28**	**48.60**	**39.46**	**48.04**	**40.36**	**55.96**	**67.06**	**587.45**
Yeovil town centre	37.02	2.75	7.08	2.28	0.24	0.34	1.53	4.36	0.13	55.73
Yeovil other	86.83	0.69	5.20	11.57	3.20	1.78	5.37	11.81	0.00	126.43
Chard	0.00	0.00	0.00	0.24	4.46	41.31	2.34	0.00	0.00	48.36
Crewkerne	0.54	0.00	0.83	17.16	3.16	0.62	4.76	0.00	0.00	27.07
Ilminster	0.00	0.00	0.00	2.77	16.06	0.29	0.16	0.00	0.00	19.28
Langport	0.81	0.00	12.77	0.19	2.84	0.00	0.00	0.00	0.00	16.61
Somerton	0.00	0.00	8.68	0.00	0.00	0.00	0.00	0.00	0.47	9.15
Wincanton	0.27	41.68	0.17	0.00	0.00	0.00	0.00	5.54	0.20	47.85
Castle Cary	0.40	6.08	0.00	0.00	0.12	0.00	0.00	0.00	1.54	8.14
Martock	0.00	0.00	4.92	0.00	0.55	0.00	0.00	0.00	0.00	5.47
Illchester	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.27
Other South Somerset	1.62	0.88	1.66	11.91	1.10	0.00	1.57	0.22	0.20	19.17
South Somerset Total	**127.76**	**52.07**	**41.30**	**46.12**	**31.73**	**44.34**	**15.74**	**21.94**	**2.55**	**383.54**
Axminster	0.00	0.00	0.00	0.00	0.00	1.39	0.00	0.00	0.00	1.39
Bridport	0.00	0.00	0.00	0.19	0.12	0.00	15.70	0.00	0.00	16.01
Bridgwater	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.74	0.90
Dorcester	0.00	0.00	0.00	0.00	0.00	0.00	1.09	0.39	0.00	1.48
Exeter	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.40
Gillingham	0.13	27.65	0.11	0.00	0.00	0.00	0.00	0.62	0.00	28.51
Honiton	0.00	0.00	0.00	0.00	0.20	0.19	0.00	0.00	0.00	0.39
Shepton Mallet	0.27	4.71	0.39	0.00	0.00	0.00	0.00	0.00	7.51	12.87
Sherborne	3.23	3.14	0.11	1.75	0.00	0.00	1.37	31.28	0.00	40.88
Street/Glastonbury	0.00	0.49	10.17	0.10	0.00	0.00	0.00	0.00	50.97	61.73
Taunton	0.13	0.00	2.43	0.44	6.35	1.83	0.00	0.00	0.00	11.18
Wells	0.00	0.00	0.50	0.00	0.00	0.00	0.00	0.00	2.08	2.58
Other Outside S. Somerset	2.69	10.00	0.11	0.00	1.07	0.29	6.46	1.73	3.22	25.57
Other Sub-Total	**6.87**	**45.99**	**13.99**	**2.48**	**7.73**	**3.70**	**24.62**	**34.02**	**64.51**	**203.91**
TOTAL	**134.62**	**98.06**	**55.28**	**48.60**	**39.46**	**48.04**	**40.36**	**55.96**	**67.06**	**587.45**

Source: Table 3 and 4

Table 9 **2034 Convenience Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2034	**137.68**	**100.30**	**56.54**	**49.71**	**40.35**	**49.33**	**41.29**	**57.31**	**68.85**	**601.36**
Yeovil town centre	37.86	2.81	7.24	2.34	0.24	0.35	1.57	4.47	0.14	57.01
Yeovil other	88.80	0.70	5.31	11.83	3.27	1.83	5.49	12.09	0.00	129.32
Chard	0.00	0.00	0.00	0.25	4.56	42.42	2.39	0.00	0.00	49.63
Crewkerne	0.55	0.00	0.85	17.55	3.23	0.64	4.87	0.00	0.00	27.69
Ilminster	0.00	0.00	0.00	2.83	16.42	0.30	0.17	0.00	0.00	19.72
Langport	0.83	0.00	13.06	0.20	2.91	0.00	0.00	0.00	0.00	16.99
Somerton	0.00	0.00	8.88	0.00	0.00	0.00	0.00	0.00	0.48	9.36
Wincanton	0.28	42.63	0.17	0.00	0.00	0.00	0.00	5.67	0.21	48.95
Castle Cary	0.41	6.22	0.00	0.00	0.12	0.00	0.00	0.00	1.58	8.34
Martock	0.00	0.00	5.03	0.00	0.56	0.00	0.00	0.00	0.00	5.60
Illchester	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28
Other South Somerset	1.65	0.90	1.70	12.18	1.13	0.00	1.61	0.23	0.21	19.60
South Somerset Total	**130.65**	**53.26**	**42.23**	**47.17**	**32.45**	**45.53**	**16.10**	**22.46**	**2.62**	**392.48**
Axminster	0.00	0.00	0.00	0.00	0.00	1.43	0.00	0.00	0.00	1.43
Bridport	0.00	0.00	0.00	0.20	0.12	0.00	16.06	0.00	0.00	16.38
Bridgwater	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.76	0.93
Dorcester	0.00	0.00	0.00	0.00	0.00	0.00	1.11	0.40	0.00	1.52
Exeter	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41
Gillingham	0.14	28.29	0.11	0.00	0.00	0.00	0.00	0.63	0.00	29.17
Honiton	0.00	0.00	0.00	0.00	0.20	0.20	0.00	0.00	0.00	0.40
Shepton Mallet	0.28	4.81	0.40	0.00	0.00	0.00	0.00	0.00	7.71	13.20
Sherborne	3.30	3.21	0.11	1.79	0.00	0.00	1.40	32.04	0.00	41.86
Street/Glastonbury	0.00	0.50	10.40	0.10	0.00	0.00	0.00	0.00	52.33	63.33
Taunton	0.14	0.00	2.49	0.45	6.50	1.87	0.00	0.00	0.00	11.44
Wells	0.00	0.00	0.51	0.00	0.00	0.00	0.00	0.00	2.13	2.64
Other Outside S. Somerset	2.75	10.23	0.11	0.00	1.09	0.30	6.61	1.78	3.30	26.17
Other Sub-Total	**7.02**	**47.04**	**14.30**	**2.53**	**7.91**	**3.80**	**25.19**	**34.84**	**66.24**	**208.88**
TOTAL	**137.68**	**100.30**	**56.54**	**49.71**	**40.35**	**49.33**	**41.29**	**57.31**	**68.85**	**601.36**

Source: Table 3 and 4

Table 10 Convenience Goods Floorspace and Benchmark Turnover 2017

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Yeovil	Asda Superstore	3,482	85%	2,960	£15,213	£45.03
	Farmfoods	697	98%	683	£7,881	£5.38
	Iceland	290	98%	284	£8,045	£2.29
	M&S Foodhall	840	100%	840	£10,474	£8.80
	Tesco Extra	7,713	60%	4,628	£11,058	£51.17
	Lidl, Lyde Road	1,206	85%	1,025	£7,723	£7.92
	Lidl, West Hendford	1,583	80%	1,266	£7,723	£9.78
	Morrisons	2,937	85%	2,496	£10,849	£27.08
	Tesco Express	206	95%	196	£11,058	£2.16
	Tesco Express	166	95%	158	£11,058	£1.74
	Tesco Express	151	95%	143	£11,058	£1.59
	Co-op	365	95%	347	£8,903	£3.09
	Co-op	202	95%	192	£8,903	£1.71
	Other Yeovil	2,000	100%	2,000	£5,000	£10.00
	Sub Total	**21,838**		**17,218**		**£177.74**
Chard	Lidl	871	85%	740	£7,723	£5.72
	My Local	172	95%	163	£7,000	£1.14
	Sainsbury's	996	90%	896	£11,690	£10.48
	Tesco	1,954	90%	1,759	£11,058	£19.45
	Coop	828	95%	787	£8,903	£7.00
	Other Chard	404	100%	404	£5,000	£2.02
	Sub-Total	**5,225**		**4,749**		**£45.81**
Crewkerne	Lidl	707	85%	601	£7,723	£4.64
	Waitrose	1,572	85%	1,336	£11,665	£15.59
	Other Crewkerne	437	100%	437	£5,000	£2.19
	Sub-Total	**2,716**		**2,374**		**£22.41**
Illminster	Tesco	1,624	90%	1,462	£11,058	£16.16
	Co-op	605	95%	575	£8,903	£5.12
	Other Illminster	423	100%	423	£5,000	£2.12
	Sub Total	**2,652**		**2,459**		**£23.39**
Langport	Tesco Metro	850	95%	808	£11,058	£8.93
	Other Langport	218	100%	218	£5,000	£1.09
	Sub-Total	**1,068**		**1,026**		**£10.02**
Somerton	Williams Supermarket	689	95%	655	£8,000	£5.24
	Other Somerton	296	100%	296	£5,000	£1.48
	Sub-Total	**985**		**951**		**£6.72**
Wincanton	Lidl	669	85%	569	£7,723	£4.39
	Morrisons	2,494	90%	2,245	£10,849	£24.35
	Co-op	365	95%	347	£8,903	£3.09
	Other Wincanton	200	100%	200	£5,000	£1.00
	Sub Total	**3,728**		**3,360**		**£32.83**
Castle Cary	Co-op	105	95%	100	£8,903	£0.89
	Other Castle Cary	276	100%	276	£5,000	£1.38
	Sub Total	**381**		**376**		**£2.27**
Martock	Co-op	216	95%	205	£8,903	£1.83
	Other Martock	285	100%	285	£5,000	£1.43
	Sub Total	**501**		**490**		**£3.25**
Illchester	Other Illchester	30	100%	30	£5,000	£0.15
	Sub Total	**30**		**30**		**£0.15**
TOTAL		**39,124**		**33,033**		**£324.59**

Source: ORC StorePoint, South Somerset Council's Land Use Survey January 2017, Lichfields on site survey and Mintel 2016

Table 11 **Summary of Convenience Goods Expenditure 2017 to 2034 (£M)**

Area	2017	2019	2024	2029	2034
Available Expenditure					
Yeovil	174.63	174.21	177.85	182.16	186.33
Chard	45.95	45.90	47.02	48.36	49.63
Crewkerne	25.97	25.90	26.43	27.07	27.69
Ilminster	18.50	18.45	18.83	19.28	19.72
Langport	15.94	15.90	16.23	16.61	16.99
Somerton	8.77	8.75	8.93	9.15	9.36
Wincanton	45.84	45.73	46.71	47.85	48.95
Castle Cary	7.80	7.78	7.95	8.14	8.34
Martock	5.25	5.24	5.34	5.47	5.60
Illchester	0.26	0.26	0.26	0.27	0.28
Other South Somerset	18.39	18.34	18.72	19.17	19.60
Total	**367.29**	**366.46**	**374.26**	**383.54**	**392.48**
Benchmark Turnover of Existing Facilities					
Yeovil	177.74	177.74	177.74	177.74	177.74
Chard	45.81	45.81	45.81	45.81	45.81
Crewkerne	22.41	22.41	22.41	22.41	22.41
Ilminster	23.39	23.39	23.39	23.39	23.39
Langport	10.02	10.02	10.02	10.02	10.02
Somerton	6.72	6.72	6.72	6.72	6.72
Wincanton	32.83	32.83	32.83	32.83	32.83
Castle Cary	2.27	2.27	2.27	2.27	2.27
Martock	3.25	3.25	3.25	3.25	3.25
Illchester	0.15	0.15	0.15	0.15	0.15
Other South Somerset	18.39	18.39	18.39	18.39	18.39
Total	**342.98**	**342.98**	**342.98**	**342.98**	**342.98**

Source: Tables 5 to 10

Table 12 **Convenience Goods Floorspace Capacity up to 2034**

	Area	2017	2019	2024	2029	2034
Surplus/Deficit Expenditure (£m)	Yeovil	-3.10	-3.53	0.11	4.42	8.59
	Chard	0.14	0.09	1.21	2.55	3.81
	Crewkerne	3.55	3.49	4.02	4.65	5.27
	Ilminster	-4.90	-4.94	-4.57	-4.11	-3.68
	Langport	5.92	5.88	6.21	6.59	6.97
	Somerton	2.06	2.04	2.22	2.43	2.64
	Wincanton	13.01	12.90	13.88	15.02	16.12
	Castle Cary	5.53	5.51	5.68	5.88	6.07
	Martock	2.00	1.99	2.09	2.22	2.34
	Illchester	0.11	0.11	0.11	0.12	0.13
	Other South Somerset	0.00	-0.05	0.33	0.78	1.22
	Total	**24.32**	**23.48**	**31.29**	**40.56**	**49.50**
Turnover Density New Floorspace (£ per sq.m)		£11,394	£11,394	£11,394	£11,394	£11,394
Floorspace Projection (sq.m net)	Yeovil	-272	-310	10	388	754
	Chard	12	8	106	223	335
	Crewkerne	312	306	353	409	463
	Ilminster	-430	-434	-401	-361	-323
	Langport	520	516	545	579	612
	Somerton	181	179	195	213	232
	Wincanton	1,142	1,132	1,218	1,319	1,415
	Castle Cary	485	484	498	516	533
	Martock	175	174	184	195	206
	Illchester	10	9	10	10	11
	Other South Somerset	0	-4	29	68	107
	Total	**2,134**	**2,061**	**2,746**	**3,560**	**4,344**
Floorspace Projection (sq.m gross)	Yeovil	-389	-442	14	555	1,078
	Chard	18	12	152	319	478
	Crewkerne	445	437	504	584	661
	Ilminster	-614	-620	-573	-516	-461
	Langport	743	738	778	827	874
	Somerton	258	255	278	305	331
	Wincanton	1,631	1,617	1,740	1,884	2,022
	Castle Cary	693	691	712	737	761
	Martock	251	249	262	278	294
	Illchester	14	14	14	15	16
	Other South Somerset	0	-6	41	98	153
	Total	**3,049**	**2,944**	**3,923**	**5,085**	**6,206**

Source: £11,394 - average sales density of convenience goods retailers

Appendix 3: Comparison Assessment

Table 1 **Study Area Population**

Zone	2011	2017	2019	2024	2029	2034
Zone 1 - Yeovil	60,559	62,775	63,452	65,217	66,795	68,185
Zone 2 - Wincanton	40,778	42,276	42,733	43,946	45,021	45,964
Zone 3 - Langport/Somerton	22,360	23,178	23,428	24,080	24,663	25,176
Zone 4 - Crewkerne	20,160	20,898	21,123	21,711	22,236	22,699
Zone 5 - Ilminster	15,721	16,296	16,472	16,930	17,340	17,701
Zone 6 - Chard	20,429	21,278	21,545	22,248	22,900	23,471
Zone 7 - West Dorset	15,247	15,585	15,738	16,184	16,583	16,936
Zone 8 - Sherborne	22,908	23,776	24,043	24,845	25,513	26,080
Zone 9 - Street	29,785	30,657	31,011	31,992	32,919	33,736
Total	**247,947**	**256,720**	**259,546**	**267,153**	**273,969**	**279,949**

Sources: *Experian 2011 Census of Population*
Office of National Statistics 2014 SNPP projections

Table 2 **Comparison Goods Expenditure per person per annum (£)**

Zone	2017	2019	2024	2029	2034
Zone 1 - Yeovil	2,906	2,988	3,421	3,995	4,660
Zone 2 - Wincanton	3,167	3,256	3,729	4,354	5,079
Zone 3 - Langport/Somerton	3,317	3,411	3,906	4,561	5,320
Zone 4 - Crewkerne	3,108	3,196	3,659	4,273	4,984
Zone 5 - Ilminster	3,279	3,372	3,861	4,509	5,260
Zone 6 - Chard	2,887	2,968	3,399	3,969	4,630
Zone 7 - West Dorset	3,641	3,744	4,288	5,007	5,840
Zone 8 - Sherborne	3,257	3,349	3,835	4,478	5,223
Zone 9 - Street	3,062	3,148	3,605	4,210	4,911

Sources:
Experian Local Expenditure 2015 (2015 prices)
Growth Rates: 3.3% 2015-2016, 1.4% 2016-2017, 1% 2017 to 2018, 3% p.a. from 2019 to 2023 and 3.2% from 2024
Excludes Special Forms of Trading

Table 3 **Total Comparison Goods Expenditure (£m)**

Zone	2017	2019	2024	2029	2034
Zone 1 - Yeovil	182.40	189.57	223.13	266.87	317.75
Zone 2 - Wincanton	133.87	139.14	163.85	196.03	233.44
Zone 3 - Langport/Somerton	76.89	79.91	94.06	112.50	133.95
Zone 4 - Crewkerne	64.95	67.50	79.45	95.02	113.14
Zone 5 - Ilminster	53.44	55.54	65.38	78.19	93.10
Zone 6 - Chard	61.42	63.95	75.62	90.90	108.66
Zone 7 - West Dorset	56.75	58.93	69.39	83.03	98.91
Zone 8 - Sherborne	77.43	80.52	95.28	114.25	136.23
Zone 9 - Street	93.86	97.63	115.34	138.59	165.67
Study Area Total	**801.02**	**832.68**	**981.49**	**1,175.39**	**1,400.84**

Source: Tables 1 and 2

Table 4 **Base Year 2017 Comparison Goods Market Shares (%)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Yeovil town centre	57.5%	45.7%	42.6%	50.1%	23.8%	11.3%	28.8%	44.2%	13.4%
Yeovil other (inc. Peel Centre)	19.9%	8.6%	7.3%	12.9%	1.8%	2.0%	9.0%	8.1%	3.0%
Chard	0.0%	0.0%	0.0%	0.6%	5.4%	20.6%	1.8%	0.0%	0.0%
Crewkerne	0.4%	0.1%	0.5%	4.1%	1.8%	0.1%	2.8%	0.0%	0.0%
Ilminster	0.0%	0.0%	0.1%	2.2%	9.6%	1.7%	0.0%	0.0%	0.0%
Langport	0.0%	0.0%	2.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Somerton	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Wincanton	0.0%	5.4%	0.0%	0.1%	0.0%	0.1%	0.0%	1.8%	0.0%
Castle Cary	0.1%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
Martock	0.0%	0.1%	4.1%	0.6%	0.6%	0.1%	0.1%	0.2%	0.1%
Other South Somerset	2.4%	0.5%	0.7%	4.2%	0.9%	0.2%	0.0%	0.3%	0.2%
South Somerset Total	**80.3%**	**63.2%**	**62.6%**	**74.8%**	**44.3%**	**36.1%**	**42.5%**	**54.6%**	**19.6%**
Axminster	0.1%	0.1%	0.0%	0.1%	0.0%	1.3%	0.5%	0.0%	0.0%
Bridport	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	16.9%	0.0%	0.0%
Bridgwater	0.4%	0.0%	2.3%	0.5%	0.0%	0.0%	0.0%	0.0%	4.7%
Dorcester	0.4%	0.3%	0.1%	0.4%	0.0%	0.4%	17.0%	3.0%	0.0%
Exeter	2.0%	0.2%	0.4%	2.2%	4.0%	7.3%	6.5%	1.0%	1.0%
Gillingham	0.0%	6.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shepton Mallet	0.3%	3.7%	0.8%	0.5%	0.0%	0.3%	0.0%	0.5%	4.8%
Sherborne	0.8%	4.2%	0.3%	0.6%	0.2%	0.0%	3.0%	30.7%	0.0%
Street/Glastonbury	2.0%	1.1%	14.7%	3.5%	4.5%	3.6%	0.0%	2.4%	42.4%
Taunton	4.7%	0.1%	11.2%	8.9%	40.0%	48.4%	2.6%	1.1%	10.1%
Wells	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%
Other Outside S. Somerset	9.0%	20.3%	6.9%	8.4%	6.9%	2.6%	11.0%	6.7%	11.9%
Other Sub-Total	**19.7%**	**36.8%**	**37.4%**	**25.2%**	**55.7%**	**63.9%**	**57.5%**	**45.4%**	**80.4%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey February 2017 (weighted results)

Table 5 **Base Year 2017 Comparison Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2017	**182.40**	**133.87**	**76.89**	**64.95**	**53.44**	**61.42**	**56.75**	**77.43**	**93.86**	**801.02**
Yeovil town centre	104.88	61.18	32.75	32.54	12.72	6.94	16.34	34.23	12.58	314.16
Yeovil other (inc. Peel Centre)	36.30	11.51	5.61	8.38	0.96	1.23	5.11	6.27	2.82	78.19
Chard	0.00	0.00	0.00	0.39	2.89	12.65	1.02	0.00	0.00	16.95
Crewkerne	0.73	0.13	0.38	2.66	0.96	0.06	1.59	0.00	0.00	6.52
Ilminster	0.00	0.00	0.08	1.43	5.13	1.04	0.00	0.00	0.00	7.68
Langport	0.00	0.00	1.54	0.00	0.21	0.00	0.00	0.00	0.00	1.75
Somerton	0.00	0.00	4.08	0.00	0.00	0.00	0.00	0.00	0.19	4.26
Wincanton	0.00	7.23	0.00	0.06	0.00	0.06	0.00	1.39	0.00	8.75
Castle Cary	0.18	3.75	0.00	0.00	0.00	0.00	0.00	0.00	2.53	6.47
Martock	0.00	0.13	3.15	0.39	0.32	0.06	0.06	0.15	0.09	4.36
Other South Somerset	4.38	0.67	0.54	2.73	0.48	0.12	0.00	0.23	0.19	9.34
South Somerset Total	**146.47**	**84.60**	**48.13**	**48.58**	**23.67**	**22.17**	**24.12**	**42.28**	**18.40**	**458.43**
Axminster	0.18	0.13	0.00	0.06	0.00	0.80	0.28	0.00	0.00	1.46
Bridport	0.00	0.00	0.00	0.06	0.05	0.00	9.59	0.00	0.00	9.71
Bridgwater	0.73	0.00	1.77	0.32	0.00	0.00	0.00	0.00	4.41	7.23
Dorcester	0.73	0.40	0.08	0.26	0.00	0.25	9.65	2.32	0.00	13.68
Exeter	3.65	0.27	0.31	1.43	2.14	4.48	3.69	0.77	0.94	17.68
Gillingham	0.00	9.10	0.08	0.00	0.00	0.00	0.00	0.00	0.00	9.18
Shepton Mallet	0.55	4.95	0.62	0.32	0.00	0.18	0.00	0.39	4.51	11.52
Sherborne	1.46	5.62	0.23	0.39	0.11	0.00	1.70	23.77	0.00	33.28
Street/Glastonbury	3.65	1.47	11.30	2.27	2.40	2.21	0.00	1.86	39.80	64.97
Taunton	8.57	0.13	8.61	5.78	21.38	29.73	1.48	0.85	9.48	86.01
Wells	0.00	0.00	0.46	0.00	0.00	0.00	0.00	0.00	5.16	5.62
Other Outside S. Somerset	16.42	27.17	5.31	5.46	3.69	1.60	6.24	5.19	11.17	82.24
Other Sub-Total	**35.93**	**49.26**	**28.76**	**16.37**	**29.77**	**39.25**	**32.63**	**35.16**	**75.47**	**342.59**
TOTAL	**182.40**	**133.87**	**76.89**	**64.95**	**53.44**	**61.42**	**56.75**	**77.43**	**93.86**	**801.02**

Source: Table 3 and 4

Table 6 **2019 Comparison Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2019	**189.57**	**139.14**	**79.91**	**67.50**	**55.54**	**63.95**	**58.93**	**80.52**	**97.63**	**832.68**
Yeovil town centre	109.00	63.58	34.04	33.82	13.22	7.23	16.97	35.59	13.08	326.53
Yeovil other (inc. Peel Centre)	37.72	11.97	5.83	8.71	1.00	1.28	5.30	6.52	2.93	81.26
Chard	0.00	0.00	0.00	0.40	3.00	13.17	1.06	0.00	0.00	17.64
Crewkerne	0.76	0.14	0.40	2.77	1.00	0.06	1.65	0.00	0.00	6.78
Ilminster	0.00	0.00	0.08	1.48	5.33	1.09	0.00	0.00	0.00	7.98
Langport	0.00	0.00	1.60	0.00	0.22	0.00	0.00	0.00	0.00	1.82
Somerton	0.00	0.00	4.24	0.00	0.00	0.00	0.00	0.00	0.20	4.43
Wincanton	0.00	7.51	0.00	0.07	0.00	0.06	0.00	1.45	0.00	9.09
Castle Cary	0.19	3.90	0.00	0.00	0.00	0.00	0.00	0.00	2.64	6.72
Martock	0.00	0.14	3.28	0.40	0.33	0.06	0.06	0.16	0.10	4.54
Other South Somerset	4.55	0.70	0.56	2.83	0.50	0.13	0.00	0.24	0.20	9.70
South Somerset Total	**152.22**	**87.93**	**50.02**	**50.49**	**24.61**	**23.09**	**25.04**	**43.96**	**19.14**	**476.50**
Axminster	0.19	0.14	0.00	0.07	0.00	0.83	0.29	0.00	0.00	1.52
Bridport	0.00	0.00	0.00	0.07	0.06	0.00	9.96	0.00	0.00	10.08
Bridgwater	0.76	0.00	1.84	0.34	0.00	0.00	0.00	0.00	4.59	7.52
Dorcester	0.76	0.42	0.08	0.27	0.00	0.26	10.02	2.42	0.00	14.21
Exeter	3.79	0.28	0.32	1.48	2.22	4.67	3.83	0.81	0.98	18.38
Gillingham	0.00	9.46	0.08	0.00	0.00	0.00	0.00	0.00	0.00	9.54
Shepton Mallet	0.57	5.15	0.64	0.34	0.00	0.19	0.00	0.40	4.69	11.97
Sherborne	1.52	5.84	0.24	0.40	0.11	0.00	1.77	24.72	0.00	34.60
Street/Glastonbury	3.79	1.53	11.75	2.36	2.50	2.30	0.00	1.93	41.40	67.56
Taunton	8.91	0.14	8.95	6.01	22.22	30.95	1.53	0.89	9.86	89.45
Wells	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.00	5.37	5.85
Other Outside S. Somerset	17.06	28.24	5.51	5.67	3.83	1.66	6.48	5.39	11.62	85.48
Other Sub-Total	**37.34**	**51.20**	**29.89**	**17.01**	**30.94**	**40.86**	**33.88**	**36.55**	**78.49**	**356.18**
TOTAL	**189.57**	**139.14**	**79.91**	**67.50**	**55.54**	**63.95**	**58.93**	**80.52**	**97.63**	**832.68**

Source: Table 3 and 4

Table 7 **2024 Comparison Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2024	**223.13**	**163.85**	**94.06**	**79.45**	**65.38**	**75.62**	**69.39**	**95.28**	**115.34**	**981.49**
Yeovil town centre	128.30	74.88	40.07	39.80	15.56	8.54	19.98	42.11	15.46	384.71
Yeovil other (inc. Peel Centre)	44.40	14.09	6.87	10.25	1.18	1.51	6.25	7.72	3.46	95.72
Chard	0.00	0.00	0.00	0.48	3.53	15.58	1.25	0.00	0.00	20.83
Crewkerne	0.89	0.16	0.47	3.26	1.18	0.08	1.94	0.00	0.00	7.98
Ilminster	0.00	0.00	0.09	1.75	6.28	1.29	0.00	0.00	0.00	9.40
Langport	0.00	0.00	1.88	0.00	0.26	0.00	0.00	0.00	0.00	2.14
Somerton	0.00	0.00	4.99	0.00	0.00	0.00	0.00	0.00	0.23	5.22
Wincanton	0.00	8.85	0.00	0.08	0.00	0.08	0.00	1.71	0.00	10.72
Castle Cary	0.22	4.59	0.00	0.00	0.00	0.00	0.00	0.00	3.11	7.93
Martock	0.00	0.16	3.86	0.48	0.39	0.08	0.07	0.19	0.12	5.34
Other South Somerset	5.36	0.82	0.66	3.34	0.59	0.15	0.00	0.29	0.23	11.43
South Somerset Total	**179.17**	**103.56**	**58.88**	**59.43**	**28.96**	**27.30**	**29.49**	**52.02**	**22.61**	**561.42**
Axminster	0.22	0.16	0.00	0.08	0.00	0.98	0.35	0.00	0.00	1.80
Bridport	0.00	0.00	0.00	0.08	0.07	0.00	11.73	0.00	0.00	11.87
Bridgwater	0.89	0.00	2.16	0.40	0.00	0.00	0.00	0.00	5.42	8.87
Dorcester	0.89	0.49	0.09	0.32	0.00	0.30	11.80	2.86	0.00	16.75
Exeter	4.46	0.33	0.38	1.75	2.62	5.52	4.51	0.95	1.15	21.67
Gillingham	0.00	11.14	0.09	0.00	0.00	0.00	0.00	0.00	0.00	11.24
Shepton Mallet	0.67	6.06	0.75	0.40	0.00	0.23	0.00	0.48	5.54	14.12
Sherborne	1.79	6.88	0.28	0.48	0.13	0.00	2.08	29.25	0.00	40.89
Street/Glastonbury	4.46	1.80	13.83	2.78	2.94	2.72	0.00	2.29	48.90	79.73
Taunton	10.49	0.16	10.53	7.07	26.15	36.60	1.80	1.05	11.65	105.51
Wells	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	6.34	6.91
Other Outside S. Somerset	20.08	33.26	6.49	6.67	4.51	1.97	7.63	6.38	13.73	100.73
Other Sub-Total	**43.96**	**60.30**	**35.18**	**20.02**	**36.41**	**48.32**	**39.90**	**43.26**	**92.73**	**420.08**
TOTAL	**223.13**	**163.85**	**94.06**	**79.45**	**65.38**	**75.62**	**69.39**	**95.28**	**115.34**	**981.49**

Source: Table 3 and 4

Table 8 **2029 Comparison Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2029	**266.87**	**196.03**	**112.50**	**95.02**	**78.19**	**90.90**	**83.03**	**114.25**	**138.59**	**1175.39**
Yeovil town centre	153.45	89.58	47.92	47.61	18.61	10.27	23.91	50.50	18.57	460.43
Yeovil other (inc. Peel Centre)	53.11	16.86	8.21	12.26	1.41	1.82	7.47	9.25	4.16	114.55
Chard	0.00	0.00	0.00	0.57	4.22	18.72	1.49	0.00	0.00	25.01
Crewkerne	1.07	0.20	0.56	3.90	1.41	0.09	2.32	0.00	0.00	9.55
Ilminster	0.00	0.00	0.11	2.09	7.51	1.55	0.00	0.00	0.00	11.25
Langport	0.00	0.00	2.25	0.00	0.31	0.00	0.00	0.00	0.00	2.56
Somerton	0.00	0.00	5.96	0.00	0.00	0.00	0.00	0.00	0.28	6.24
Wincanton	0.00	10.59	0.00	0.10	0.00	0.09	0.00	2.06	0.00	12.83
Castle Cary	0.27	5.49	0.00	0.00	0.00	0.00	0.00	0.00	3.74	9.50
Martock	0.00	0.20	4.61	0.57	0.47	0.09	0.08	0.23	0.14	6.39
Other South Somerset	6.40	0.98	0.79	3.99	0.70	0.18	0.00	0.34	0.28	13.67
South Somerset Total	**214.30**	**123.89**	**70.42**	**71.08**	**34.64**	**32.81**	**35.29**	**62.38**	**27.16**	**671.98**
Axminster	0.27	0.20	0.00	0.10	0.00	1.18	0.42	0.00	0.00	2.15
Bridport	0.00	0.00	0.00	0.10	0.08	0.00	14.03	0.00	0.00	14.21
Bridgwater	1.07	0.00	2.59	0.48	0.00	0.00	0.00	0.00	6.51	10.64
Dorcester	1.07	0.59	0.11	0.38	0.00	0.36	14.12	3.43	0.00	20.06
Exeter	5.34	0.39	0.45	2.09	3.13	6.64	5.40	1.14	1.39	25.96
Gillingham	0.00	13.33	0.11	0.00	0.00	0.00	0.00	0.00	0.00	13.44
Shepton Mallet	0.80	7.25	0.90	0.48	0.00	0.27	0.00	0.57	6.65	16.93
Sherborne	2.13	8.23	0.34	0.57	0.16	0.00	2.49	35.08	0.00	49.00
Street/Glastonbury	5.34	2.16	16.54	3.33	3.52	3.27	0.00	2.74	58.76	95.65
Taunton	12.54	0.20	12.60	8.46	31.28	43.99	2.16	1.26	14.00	126.48
Wells	0.00	0.00	0.67	0.00	0.00	0.00	0.00	0.00	7.62	8.30
Other Outside S. Somerset	24.02	39.79	7.76	7.98	5.40	2.36	9.13	7.66	16.49	120.60
Other Sub-Total	**52.57**	**72.14**	**42.07**	**23.95**	**43.55**	**58.08**	**47.74**	**51.87**	**111.43**	**503.41**
TOTAL	**266.87**	**196.03**	**112.50**	**95.02**	**78.19**	**90.90**	**83.03**	**114.25**	**138.59**	**1,175.39**

Source: Table 3 and 4

Table 9 **2034 Comparison Goods Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2034	**317.75**	**233.44**	**133.95**	**113.14**	**93.10**	**108.66**	**98.91**	**136.23**	**165.67**	**1,400.84**
Yeovil town centre	182.71	106.68	57.06	56.68	22.16	12.28	28.49	60.21	22.20	548.47
Yeovil other (inc. Peel Centre)	63.23	20.08	9.78	14.60	1.68	2.17	8.90	11.03	4.97	136.44
Chard	0.00	0.00	0.00	0.68	5.03	22.38	1.78	0.00	0.00	29.87
Crewkerne	1.27	0.23	0.67	4.64	1.68	0.11	2.77	0.00	0.00	11.37
Ilminster	0.00	0.00	0.13	2.49	8.94	1.85	0.00	0.00	0.00	13.41
Langport	0.00	0.00	2.68	0.00	0.37	0.00	0.00	0.00	0.00	3.05
Somerton	0.00	0.00	7.10	0.00	0.00	0.00	0.00	0.00	0.33	7.43
Wincanton	0.00	12.61	0.00	0.11	0.00	0.11	0.00	2.45	0.00	15.28
Castle Cary	0.32	6.54	0.00	0.00	0.00	0.00	0.00	0.00	4.47	11.33
Martock	0.00	0.23	5.49	0.68	0.56	0.11	0.10	0.27	0.17	7.61
Other South Somerset	7.63	1.17	0.94	4.75	0.84	0.22	0.00	0.41	0.33	16.28
South Somerset Total	**255.15**	**147.53**	**83.85**	**84.63**	**41.24**	**39.23**	**42.04**	**74.38**	**32.47**	**800.52**
Axminster	0.32	0.23	0.00	0.11	0.00	1.41	0.49	0.00	0.00	2.57
Bridport	0.00	0.00	0.00	0.11	0.09	0.00	16.72	0.00	0.00	16.92
Bridgwater	1.27	0.00	3.08	0.57	0.00	0.00	0.00	0.00	7.79	12.70
Dorcester	1.27	0.70	0.13	0.45	0.00	0.43	16.81	4.09	0.00	23.89
Exeter	6.35	0.47	0.54	2.49	3.72	7.93	6.43	1.36	1.66	30.95
Gillingham	0.00	15.87	0.13	0.00	0.00	0.00	0.00	0.00	0.00	16.01
Shepton Mallet	0.95	8.64	1.07	0.57	0.00	0.33	0.00	0.68	7.95	20.19
Sherborne	2.54	9.80	0.40	0.68	0.19	0.00	2.97	41.82	0.00	58.40
Street/Glastonbury	6.35	2.57	19.69	3.96	4.19	3.91	0.00	3.27	70.24	114.19
Taunton	14.93	0.23	15.00	10.07	37.24	52.59	2.57	1.50	16.73	150.88
Wells	0.00	0.00	0.80	0.00	0.00	0.00	0.00	0.00	9.11	9.92
Other Outside S. Somerset	28.60	47.39	9.24	9.50	6.42	2.83	10.88	9.13	19.71	143.70
Other Sub-Total	**62.60**	**85.90**	**50.10**	**28.51**	**51.86**	**69.44**	**56.87**	**61.85**	**133.20**	**600.32**
TOTAL	**317.75**	**233.44**	**133.95**	**113.14**	**93.10**	**108.66**	**98.91**	**136.23**	**165.67**	**1,400.84**

Source: Table 3 and 4

Table 10 **Comparison Goods Floorspace**

Area	Store	Sales Floorspace (sq.m net)
Yeovil town centre	Town Centre	40,569
	Comparison sales in food stores	3,105
	Sub Total	**43,674**
Yeovil other	Comparison sales in food stores	1,350
(including The Peel Centre)	Retail Warehouses	32,484
	Sub Total	**33,834**
Chard	Town Centre	3,352
	Comparison sales in food stores	476
	Sub-Total	**3,828**
Crewkerne	Town Centre	3,265
	Comparison sales in food stores	386
	Sub-Total	**3,651**
Illminster	Town Centre	1,762
	Comparison sales in food stores	193
	Sub Total	**1,955**
Langport	Town Centre	628
	Comparison sales in food stores	43
	Sub-Total	**671**
Somerton	Town Centre	1,334
	Comparison sales in food stores	34
	Sub-Total	**1,334**
Wincanton	Town Centre	1,479
	Comparison sales in food stores	368
	Sub Total	**1,847**
Castle Cary	Town Centre	1,310
	Comparison sales in food stores	5
	Sub Total	**1,315**
Martock	Town Centre	203
	Comparison sales in food stores	11
	Sub Total	**214**
Other South Somerset		930
TOTAL		**93,253**

Source: *ORC Storepoint and VOA data*

Table 11 **Summary of Comparisons Goods Expenditure 2017 to 2034 (£M)**

Area	2017	2019	2024	2029	2034
Available Expenditure					
Yeovil	392.35	407.80	480.43	574.98	684.90
Chard	16.95	17.64	20.83	25.01	29.87
Crewkerne	6.52	6.78	7.98	9.55	11.37
Ilminster	7.68	7.98	9.40	11.25	13.41
Langport	1.75	1.82	2.14	2.56	3.05
Somerton	4.26	4.43	5.22	6.24	7.43
Wincanton	8.75	9.09	10.72	12.83	15.28
Castle Cary	6.47	6.72	7.93	9.50	11.33
Martock	4.36	4.54	5.34	6.39	7.61
Other South Somerset	9.34	9.70	11.43	13.67	16.28
Total	**458.43**	**476.50**	**561.42**	**671.98**	**800.52**
Benchmark Turnover of Existing Facilities					
Yeovil	392.35	408.20	450.68	497.59	549.38
Chard	16.95	17.63	19.47	21.50	23.73
Crewkerne	6.52	6.79	7.49	8.27	9.13
Ilminster	7.68	7.99	8.82	9.74	10.75
Langport	1.75	1.82	2.01	2.22	2.45
Somerton	4.26	4.44	4.90	5.41	5.97
Wincanton	8.75	9.10	10.05	11.10	12.25
Castle Cary	6.47	6.73	7.43	8.20	9.05
Martock	4.36	4.54	5.01	5.53	6.11
Other South Somerset	9.34	9.71	10.72	11.84	13.07
Total	**458.43**	**476.95**	**526.59**	**581.40**	**641.91**
Surplus Expenditure (£m)					
Yeovil	0.00	-0.40	29.75	77.39	135.53
Chard	0.00	0.00	1.36	3.51	6.14
Crewkerne	0.00	-0.01	0.49	1.27	2.23
Ilminster	0.00	-0.01	0.58	1.51	2.65
Langport	0.00	0.00	0.13	0.34	0.60
Somerton	0.00	0.00	0.32	0.83	1.46
Wincanton	0.00	-0.01	0.67	1.73	3.03
Castle Cary	0.00	0.00	0.50	1.30	2.27
Martock	0.00	0.00	0.33	0.85	1.50
Other South Somerset	0.00	-0.01	0.70	1.83	3.20
Total	**0.00**	**-0.44**	**34.83**	**90.58**	**158.61**

Source: Tables 5 to 9

Table 12 **Comparison Goods Floorspace Capacity up to 2034**

Area	2017	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,242	£6,892	£7,609	£8,401
Sales Floorspace Projection (sq.m net)					
Yeovil	0	-64	4,317	10,170	16,131
Chard	0	1	198	462	730
Crewkerne	0	-1	71	167	266
Ilminster	0	-1	84	199	316
Langport	0	0	19	45	71
Somerton	0	-1	46	109	174
Wincanton	0	-1	97	228	360
Castle Cary	0	-1	72	171	271
Martock	0	-1	48	112	178
Other South Somerset	0	-2	102	240	381
Total	**0**	**-71**	**5,053**	**11,904**	**18,879**
Floorspace Projection (sq.m gross)					
Yeovil	0	-85	5,755	13,561	21,508
Chard	0	1	264	616	974
Crewkerne	0	-2	94	223	354
Ilminster	0	-1	112	265	421
Langport	0	0	25	60	95
Somerton	0	-1	62	146	232
Wincanton	0	-2	129	304	481
Castle Cary	0	-1	97	228	361
Martock	0	-1	63	150	238
Other South Somerset	0	-2	136	320	509
Total	**0**	**-95**	**6,738**	**15,871**	**25,173**

Appendix 4: Food/Beverage Assessment

Table 1 **Study Area Population**

Zone	2011	2017	2019	2024	2029	2034
Zone 1 - Yeovil	60,559	62,775	63,452	65,217	66,795	68,185
Zone 2 - Wincanton	40,778	42,276	42,733	43,946	45,021	45,964
Zone 3 - Langport/Somerton	22,360	23,178	23,428	24,080	24,663	25,176
Zone 4 - Crewkerne	20,160	20,898	21,123	21,711	22,236	22,699
Zone 5 - Ilminster	15,721	16,296	16,472	16,930	17,340	17,701
Zone 6 - Chard	20,429	21,278	21,545	22,248	22,900	23,471
Zone 7 - West Dorset	15,247	15,585	15,738	16,184	16,583	16,936
Zone 8 - Sherborne	22,908	23,776	24,043	24,845	25,513	26,080
Zone 9 - Street	29,785	30,657	31,011	31,992	32,919	33,736
Total	**247,947**	**256,720**	**259,546**	**267,153**	**273,969**	**279,949**

Sources: *Experian 2011 Census of Population*
Office of National Statistics 2014 SNPP projections

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

Zone	2017	2019	2024	2029	2034
Zone 1 - Yeovil	1,024	1,045	1,116	1,203	1,296
Zone 2 - Wincanton	1,099	1,121	1,199	1,291	1,391
Zone 3 - Langport/Somerton	1,153	1,176	1,257	1,354	1,459
Zone 4 - Crewkerne	1,080	1,101	1,177	1,268	1,366
Zone 5 - Ilminster	1,141	1,164	1,244	1,340	1,443
Zone 6 - Chard	1,017	1,037	1,109	1,194	1,287
Zone 7 - West Dorset	1,248	1,273	1,361	1,466	1,579
Zone 8 - Sherborne	1,130	1,153	1,232	1,328	1,430
Zone 9 - Street	1,074	1,095	1,170	1,261	1,358

Sources:
Experian Local Expenditure 2015 (2015 prices)
Growth Rates: 1.9% 2015-2016, 0.5% 2016-2017, 0.2% 2017 to 2018, 1.3% p.a. from 2019 to 2023 and 1.5% from 2024
Excludes Special Forms of Trading

Table 3 **Total Food and Beverage Expenditure (£m)**

Zone	2017	2019	2024	2029	2034
Zone 1 - Yeovil	64.28	66.28	72.81	80.34	88.35
Zone 2 - Wincanton	46.46	47.92	52.67	58.13	63.94
Zone 3 - Langport/Somerton	26.72	27.56	30.27	33.40	36.73
Zone 4 - Crewkerne	22.57	23.27	25.56	28.20	31.01
Zone 5 - Ilminster	18.59	19.17	21.06	23.23	25.55
Zone 6 - Chard	21.64	22.35	24.66	27.35	30.20
Zone 7 - West Dorset	19.45	20.04	22.02	24.31	26.74
Zone 8 - Sherborne	26.87	27.72	30.62	33.87	37.30
Zone 9 - Street	32.93	33.96	37.45	41.51	45.83
Study Area Total	**279.51**	**288.26**	**317.12**	**350.34**	**385.64**

Source: Tables 1 and 2

Table 4 **Base Year 2017 Food and Beverage Market Shares (%)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Yeovil	73.3%	21.2%	28.9%	37.3%	19.4%	12.9%	7.5%	22.0%	12.1%
Chard	0%	0.0%	0.0%	1.6%	2.3%	44.9%	1.1%	0.0%	0.0%
Crewkerne	1.2%	0.0%	0.0%	7.9%	0.0%	0.0%	1.1%	0.0%	0.0%
Ilminster	0.0%	0.0%	1.0%	1.7%	15.9%	0.0%	1.1%	0.0%	0.0%
Langport	0.0%	0.0%	7.2%	0.3%	0.5%	0.0%	0.0%	1.5%	1.0%
Somerton	0.0%	1.0%	29.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%
Wincanton	2.8%	22.4%	0.0%	0.0%	0.0%	0.8%	0.0%	4.4%	0.0%
Castle Cary	0.3%	4.1%	4.1%	0.0%	0.0%	0.0%	0.0%	1.6%	2.5%
Martock	0.3%	0.0%	4.0%	3.2%	0.3%	0.0%	0.0%	0.0%	0.0%
Other South Somerset	5.9%	11.6%	5.3%	30.0%	11.5%	2.5%	0.0%	2.0%	1.8%
South Somerset Total	**83.8%**	**60.3%**	**79.7%**	**82.3%**	**49.9%**	**61.1%**	**10.8%**	**31.5%**	**17.7%**
Bridport	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	30.8%	0.0%	0.0%
Bridgwater	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Dorcester	4.7%	0.2%	0.0%	2.3%	0.0%	0.0%	25.9%	3.7%	0.0%
Exeter	0.3%	1.2%	0.0%	0.0%	4.6%	4.9%	0.0%	0.0%	0.0%
Gillingham	0.0%	18.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Honiton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shepton Mallet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Sherborne	1.9%	2.2%	1.0%	3.8%	0.0%	0.0%	3.1%	46.4%	0.0%
Street/Glastonbury	1.2%	0.0%	3.8%	0.3%	0.0%	0.0%	0.0%	0.0%	55.6%
Taunton	4.1%	0.0%	4.6%	4.6%	30.2%	24.1%	0.0%	3.7%	0.9%
Wells	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%
Other Outside S. Somerset	4.0%	17.5%	9.9%	6.7%	15.3%	9.9%	29.4%	14.7%	17.5%
Other Sub-Total	**16.2%**	**39.7%**	**20.3%**	**17.7%**	**50.1%**	**38.9%**	**89.2%**	**68.5%**	**82.3%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey February 2017 (weighted results)

Table 5 **Base Year 2017 Food and Beverage Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2017	**64.28**	**46.46**	**26.72**	**22.57**	**18.59**	**21.64**	**19.45**	**26.87**	**32.93**	**279.51**
Yeovil	47.12	9.85	7.72	8.42	3.61	2.79	1.46	5.91	3.98	90.86
Chard	0.00	0.00	0.00	0.36	0.43	9.72	0.21	0.00	0.00	10.72
Crewkerne	0.77	0.00	0.00	1.78	0.00	0.00	0.21	0.00	0.00	2.77
Ilminster	0.00	0.00	0.27	0.38	2.96	0.00	0.21	0.00	0.00	3.82
Langport	0.00	0.00	1.92	0.07	0.09	0.00	0.00	0.40	0.33	2.82
Somerton	0.00	0.46	7.80	0.07	0.00	0.00	0.00	0.00	0.10	8.43
Wincanton	1.80	10.41	0.00	0.00	0.00	0.17	0.00	1.18	0.00	13.56
Castle Cary	0.19	1.90	1.10	0.00	0.00	0.00	0.00	0.43	0.82	4.45
Martock	0.19	0.00	1.07	0.72	0.06	0.00	0.00	0.00	0.00	2.04
Other South Somerset	3.79	5.39	1.42	6.77	2.14	0.54	0.00	0.54	0.59	21.18
South Somerset Total	**53.87**	**28.02**	**21.30**	**18.57**	**9.28**	**13.22**	**2.10**	**8.46**	**5.83**	**160.65**
Bridport	0.00	0.00	0.27	0.00	0.00	0.00	5.99	0.00	0.00	6.26
Bridgwater	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72	0.72
Dorcester	3.02	0.09	0.00	0.52	0.00	0.00	5.04	0.99	0.00	9.66
Exeter	0.19	0.56	0.00	0.00	0.86	1.06	0.00	0.00	0.00	2.67
Gillingham	0.00	8.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.64
Honiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shepton Mallet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.49
Sherborne	1.22	1.02	0.27	0.86	0.00	0.00	0.60	12.47	0.00	16.44
Street/Glastonbury	0.77	0.00	1.02	0.07	0.00	0.00	0.00	0.00	18.31	20.16
Taunton	2.64	0.00	1.23	1.04	5.62	5.22	0.00	0.99	0.30	17.02
Wells	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.51	1.51
Other Outside S. Somerset	2.57	8.13	2.65	1.51	2.84	2.14	5.72	3.95	5.76	35.28
Other Sub-Total	**10.41**	**18.45**	**5.43**	**3.99**	**9.32**	**8.42**	**17.35**	**18.40**	**27.10**	**118.86**
TOTAL	**64.28**	**46.46**	**26.72**	**22.57**	**18.59**	**21.64**	**19.45**	**26.87**	**32.93**	**279.51**

Source: Table 3 and 4

Table 6 **2019 Food and Beverage Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2019	**66.28**	**47.92**	**27.56**	**23.27**	**19.17**	**22.35**	**20.04**	**27.72**	**33.96**	**288.26**
Yeovil	48.58	10.16	7.96	8.68	3.72	2.88	1.50	6.10	4.11	93.70
Chard	0.00	0.00	0.00	0.37	0.44	10.03	0.22	0.00	0.00	11.07
Crewkerne	0.80	0.00	0.00	1.84	0.00	0.00	0.22	0.00	0.00	2.85
Ilminster	0.00	0.00	0.28	0.40	3.05	0.00	0.22	0.00	0.00	3.94
Langport	0.00	0.00	1.98	0.07	0.10	0.00	0.00	0.42	0.34	2.91
Somerton	0.00	0.48	8.05	0.07	0.00	0.00	0.00	0.00	0.10	8.70
Wincanton	1.86	10.73	0.00	0.00	0.00	0.18	0.00	1.22	0.00	13.99
Castle Cary	0.20	1.96	1.13	0.00	0.00	0.00	0.00	0.44	0.85	4.59
Martock	0.20	0.00	1.10	0.74	0.06	0.00	0.00	0.00	0.00	2.10
Other South Somerset	3.91	5.56	1.46	6.98	2.20	0.56	0.00	0.55	0.61	21.84
South Somerset Total	**55.54**	**28.90**	**21.96**	**19.15**	**9.56**	**13.65**	**2.16**	**8.73**	**6.01**	**165.67**
Bridport	0.00	0.00	0.28	0.00	0.00	0.00	6.17	0.00	0.00	6.45
Bridgwater	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.75	0.75
Dorcester	3.12	0.10	0.00	0.54	0.00	0.00	5.19	1.03	0.00	9.96
Exeter	0.20	0.58	0.00	0.00	0.88	1.09	0.00	0.00	0.00	2.75
Gillingham	0.00	8.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.91
Honiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shepton Mallet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	0.51
Sherborne	1.26	1.05	0.28	0.88	0.00	0.00	0.62	12.86	0.00	16.96
Street/Glastonbury	0.80	0.00	1.05	0.07	0.00	0.00	0.00	0.00	18.88	20.79
Taunton	2.72	0.00	1.27	1.07	5.79	5.39	0.00	1.03	0.31	17.56
Wells	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.56	1.56
Other Outside S. Somerset	2.65	8.39	2.73	1.56	2.93	2.21	5.89	4.08	5.94	36.38
Other Sub-Total	**10.74**	**19.03**	**5.59**	**4.12**	**9.60**	**8.69**	**17.87**	**18.99**	**27.95**	**122.58**
TOTAL	**66.28**	**47.92**	**27.56**	**23.27**	**19.17**	**22.35**	**20.04**	**27.72**	**33.96**	**288.26**

Source: Table 3 and 4

Table 7 **2024 Food and Beverage Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2024	**72.81**	**52.67**	**30.27**	**25.56**	**21.06**	**24.66**	**22.02**	**30.62**	**37.45**	**317.12**
Yeovil	53.37	11.17	8.75	9.53	4.08	3.18	1.65	6.74	4.53	103.01
Chard	0.00	0.00	0.00	0.41	0.48	11.07	0.24	0.00	0.00	12.21
Crewkerne	0.87	0.00	0.00	2.02	0.00	0.00	0.24	0.00	0.00	3.14
Ilminster	0.00	0.00	0.30	0.43	3.35	0.00	0.24	0.00	0.00	4.33
Langport	0.00	0.00	2.18	0.08	0.11	0.00	0.00	0.46	0.37	3.20
Somerton	0.00	0.53	8.84	0.08	0.00	0.00	0.00	0.00	0.11	9.56
Wincanton	2.04	11.80	0.00	0.00	0.00	0.20	0.00	1.35	0.00	15.38
Castle Cary	0.22	2.16	1.24	0.00	0.00	0.00	0.00	0.49	0.94	5.05
Martock	0.22	0.00	1.21	0.82	0.06	0.00	0.00	0.00	0.00	2.31
Other South Somerset	4.30	6.11	1.60	7.67	2.42	0.62	0.00	0.61	0.67	24.00
South Somerset Total	**61.02**	**31.76**	**24.13**	**21.03**	**10.51**	**15.07**	**2.38**	**9.64**	**6.63**	**182.17**
Bridport	0.00	0.00	0.30	0.00	0.00	0.00	6.78	0.00	0.00	7.09
Bridgwater	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.82	0.82
Dorcester	3.42	0.11	0.00	0.59	0.00	0.00	5.70	1.13	0.00	10.95
Exeter	0.22	0.63	0.00	0.00	0.97	1.21	0.00	0.00	0.00	3.03
Gillingham	0.00	9.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.80
Honiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shepton Mallet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.56
Sherborne	1.38	1.16	0.30	0.97	0.00	0.00	0.68	14.21	0.00	18.71
Street/Glastonbury	0.87	0.00	1.15	0.08	0.00	0.00	0.00	0.00	20.82	22.92
Taunton	2.99	0.00	1.39	1.18	6.36	5.94	0.00	1.13	0.34	19.33
Wells	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.72	1.72
Other Outside S. Somerset	2.91	9.22	3.00	1.71	3.22	2.44	6.47	4.50	6.55	40.03
Other Sub-Total	**11.80**	**20.91**	**6.15**	**4.52**	**10.55**	**9.59**	**19.64**	**20.97**	**30.82**	**134.95**
TOTAL	**72.81**	**52.67**	**30.27**	**25.56**	**21.06**	**24.66**	**22.02**	**30.62**	**37.45**	**317.12**

Source: Table 3 and 4

Table 8 **2029 Food and Beverage Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2029	**80.34**	**58.13**	**33.40**	**28.20**	**23.23**	**27.35**	**24.31**	**33.87**	**41.51**	**350.34**
Yeovil	58.89	12.32	9.65	10.52	4.51	3.53	1.82	7.45	5.02	113.72
Chard	0.00	0.00	0.00	0.45	0.53	12.28	0.27	0.00	0.00	13.53
Crewkerne	0.96	0.00	0.00	2.23	0.00	0.00	0.27	0.00	0.00	3.46
Ilminster	0.00	0.00	0.33	0.48	3.69	0.00	0.27	0.00	0.00	4.77
Langport	0.00	0.00	2.40	0.08	0.12	0.00	0.00	0.51	0.42	3.53
Somerton	0.00	0.58	9.75	0.08	0.00	0.00	0.00	0.00	0.12	10.54
Wincanton	2.25	13.02	0.00	0.00	0.00	0.22	0.00	1.49	0.00	16.98
Castle Cary	0.24	2.38	1.37	0.00	0.00	0.00	0.00	0.54	1.04	5.57
Martock	0.24	0.00	1.34	0.90	0.07	0.00	0.00	0.00	0.00	2.55
Other South Somerset	4.74	6.74	1.77	8.46	2.67	0.68	0.00	0.68	0.75	26.49
South Somerset Total	**67.32**	**35.05**	**26.62**	**23.21**	**11.59**	**16.71**	**2.63**	**10.67**	**7.35**	**201.15**
Bridport	0.00	0.00	0.33	0.00	0.00	0.00	7.49	0.00	0.00	7.82
Bridgwater	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91	0.91
Dorcester	3.78	0.12	0.00	0.65	0.00	0.00	6.30	1.25	0.00	12.09
Exeter	0.24	0.70	0.00	0.00	1.07	1.34	0.00	0.00	0.00	3.35
Gillingham	0.00	10.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.81
Honiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shepton Mallet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	0.62
Sherborne	1.53	1.28	0.33	1.07	0.00	0.00	0.75	15.72	0.00	20.68
Street/Glastonbury	0.96	0.00	1.27	0.08	0.00	0.00	0.00	0.00	23.08	25.40
Taunton	3.29	0.00	1.54	1.30	7.02	6.59	0.00	1.25	0.37	21.36
Wells	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.91	1.91
Other Outside S. Somerset	3.21	10.17	3.31	1.89	3.55	2.71	7.15	4.98	7.26	44.23
Other Sub-Total	**13.01**	**23.08**	**6.78**	**4.99**	**11.64**	**10.64**	**21.68**	**23.20**	**34.16**	**149.19**
TOTAL	**80.34**	**58.13**	**33.40**	**28.20**	**23.23**	**27.35**	**24.31**	**33.87**	**41.51**	**350.34**

Source: Table 3 and 4

Table 9 **2034 Food and Beverage Expenditure (£m)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Expenditure 2034	**88.35**	**63.94**	**36.73**	**31.01**	**25.55**	**30.20**	**26.74**	**37.30**	**45.83**	**385.64**
Yeovil	64.76	13.55	10.62	11.57	4.96	3.90	2.01	8.21	5.55	125.10
Chard	0.00	0.00	0.00	0.50	0.59	13.56	0.29	0.00	0.00	14.94
Crewkerne	1.06	0.00	0.00	2.45	0.00	0.00	0.29	0.00	0.00	3.80
Ilminster	0.00	0.00	0.37	0.53	4.06	0.00	0.29	0.00	0.00	5.25
Langport	0.00	0.00	2.64	0.09	0.13	0.00	0.00	0.56	0.46	3.88
Somerton	0.00	0.64	10.73	0.09	0.00	0.00	0.00	0.00	0.14	11.60
Wincanton	2.47	14.32	0.00	0.00	0.00	0.24	0.00	1.64	0.00	18.68
Castle Cary	0.27	2.62	1.51	0.00	0.00	0.00	0.00	0.60	1.15	6.13
Martock	0.27	0.00	1.47	0.99	0.08	0.00	0.00	0.00	0.00	2.80
Other South Somerset	5.21	7.42	1.95	9.30	2.94	0.75	0.00	0.75	0.82	29.14
South Somerset Total	**74.04**	**38.55**	**29.27**	**25.52**	**12.75**	**18.45**	**2.89**	**11.75**	**8.11**	**221.33**
Bridport	0.00	0.00	0.37	0.00	0.00	0.00	8.24	0.00	0.00	8.60
Bridgwater	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.01	1.01
Dorcester	4.15	0.13	0.00	0.71	0.00	0.00	6.93	1.38	0.00	13.30
Exeter	0.27	0.77	0.00	0.00	1.18	1.48	0.00	0.00	0.00	3.69
Gillingham	0.00	11.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.89
Honiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shepton Mallet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.69	0.69
Sherborne	1.68	1.41	0.37	1.18	0.00	0.00	0.83	17.31	0.00	22.77
Street/Glastonbury	1.06	0.00	1.40	0.09	0.00	0.00	0.00	0.00	25.48	28.03
Taunton	3.62	0.00	1.69	1.43	7.72	7.28	0.00	1.38	0.41	23.52
Wells	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.11	2.11
Other Outside S. Somerset	3.53	11.19	3.64	2.08	3.91	2.99	7.86	5.48	8.02	48.70
Other Sub-Total	**14.31**	**25.38**	**7.46**	**5.49**	**12.80**	**11.75**	**23.86**	**25.55**	**37.72**	**164.31**
TOTAL	**88.35**	**63.94**	**36.73**	**31.01**	**25.55**	**30.20**	**26.74**	**37.30**	**45.83**	**385.64**

Source: Table 3 and 4

Table 10 **Food and Beverage Units**

Area	Use Class	Number of Units
Yeovil	Class A3	33
	Class A4	12
	Class A5	25
	Sub Total	**70**
Chard	Class A3	7
	Class A4	2
	Class A5	6
	Sub-Total	**15**
Crewkerne	Class A3	7
	Class A4	4
	Class A5	3
	Sub-Total	**14**
Illminster	Class A3	5
	Class A4	2
	Class A5	1
	Sub Total	**8**
Langport	Class A3	5
	Class A4	1
	Class A5	4
	Sub-Total	**10**
Somerton	Class A3	5
	Class A4	3
	Class A5	3
	Sub-Total	**11**
Wincanton	Class A3	5
	Class A4	5
	Class A5	2
	Sub Total	**12**
Castle Cary	Class A3	3
	Class A4	3
	Class A5	3
	Sub Total	**9**
Martock	Class A3	1
	Class A4	0
	Class A5	3
	Sub Total	**4**
Other South Somerset	Class A3	5
	Class A4	8
	Class A5	3
	Sub Total	**16**
TOTAL		**169**

Source: SSDC's Land Use Survey, January 2017

Table 11 **Summary of Food and Beverage Expenditure 2017 to 2034 (£M)**

Area	2017	2019	2024	2029	2034
Available Expenditure					
Yeovil	90.86	93.70	103.01	113.72	125.10
Chard	10.72	11.07	12.21	13.53	14.94
Crewkerne	2.77	2.85	3.14	3.46	3.80
Ilminster	3.82	3.94	4.33	4.77	5.25
Langport	2.82	2.91	3.20	3.53	3.88
Somerton	8.43	8.70	9.56	10.54	11.60
Wincanton	13.56	13.99	15.38	16.98	18.68
Castle Cary	4.45	4.59	5.05	5.57	6.13
Martock	2.04	2.10	2.31	2.55	2.80
Other South Somerset	21.18	21.84	24.00	26.49	29.14
Total	**160.65**	**165.67**	**182.17**	**201.15**	**221.33**
Benchmark Turnover of Existing Facilities					
Yeovil	90.86	95.50	100.37	105.49	110.87
Chard	10.72	11.27	11.84	12.44	13.08
Crewkerne	2.77	2.91	3.06	3.21	3.38
Ilminster	3.82	4.02	4.22	4.44	4.66
Langport	2.82	2.96	3.11	3.27	3.44
Somerton	8.43	8.86	9.32	9.79	10.29
Wincanton	13.56	14.25	14.98	15.75	16.55
Castle Cary	4.45	4.67	4.91	5.16	5.43
Martock	2.04	2.14	2.25	2.37	2.49
Other South Somerset	21.18	22.26	23.39	24.59	25.84
Total	**160.65**	**168.85**	**177.46**	**186.51**	**196.02**

Source: Tables 5 to 9

Table 12 **Food and Beverage Floorspace Capacity up to 2034**

	Area	2019	2024	2029	2034
Surplus/Deficit Expenditure (£m)	Yeovil	-1.80	2.64	8.23	14.23
	Chard	-0.20	0.37	1.09	1.86
	Crewkerne	-0.06	0.08	0.25	0.43
	Ilminster	-0.08	0.11	0.34	0.59
	Langport	-0.06	0.08	0.26	0.45
	Somerton	-0.17	0.24	0.75	1.30
	Wincanton	-0.27	0.40	1.23	2.13
	Castle Cary	-0.09	0.13	0.41	0.71
	Martock	-0.04	0.06	0.18	0.31
	Other South Somerset	-0.42	0.61	1.91	3.30
	Total	**-3.17**	**4.71**	**14.64**	**25.31**
Turnover Density New Floorspace (£ per sq.m)		£5,000	£5,255	£5,523	£5,805
Floorspace Projection (sq.m gross)	Yeovil	-360	502	1,489	2,452
	Chard	-40	70	197	320
	Crewkerne	-11	15	44	73
	Ilminster	-15	20	61	101
	Langport	-11	16	47	77
	Somerton	-34	45	136	225
	Wincanton	-53	76	224	367
	Castle Cary	-17	25	74	122
	Martock	-8	11	33	54
	Other South Somerset	-84	116	345	569
	Total	**-634**	**896**	**2,650**	**4,360**

Appendix 5: Analysis of Centres

A. Yeovil Town Centre

Yeovil is the largest town within the district with a population of 45,784[11]. It is the second largest town in the county after Taunton. The Local Plan describes Yeovil as the prime economic driver within the district with approximately 31,200 employees. The town serves as the commercial and administrative centre of South Somerset District and provides facilities and services for the wider hinterland.

In retail terms, Yeovil is designated as a Principal Settlement at the top of the settlement hierarchy. Policy SS1 states that Yeovil is a strategically significant town and the prime focus for development in South Somerset.

Yeovil has a good selection of retail and service uses and its key roles include:

- **Convenience shopping** – Within the town centre boundary exists a Tesco Extra (11,572 sq. m gross), M&S food hall (592 sq. m), Iceland (596 sq. m) and several smaller operators. A Farmfoods store (812 sq. m) is situated at Sherborne Road which is just outside the town centre boundary. Outside the town centre there is an Asda (Preston Road), Morrison's (Lysander Road) and two Lidl stores (West Hendford and Lyde Road).
- **Comparison shopping** – The main comparison units are found on Middle Street and within the Quedam Shopping Centre. There is a high number of multiples (chain stores) including Argos, Animal, Primark, Peacocks, Wilkinsons, Marks & Spencer, Monsoon, WH Smith and HMV. Beales Department Store (formerly Denners) is also present in two locations.
- **Services** – There is good range of banks with most of the national banks represented (Barclays, HSBC, Natwest, Halifax and Santander). There is a good range of travel agents and estate agents. There is a reasonable range of chain and independent cafes/restaurants within the centre. Chains restaurants include Prezzo, Subway, Ask, Burger King and Frankie & Benny's.
- **Entertainment/leisure** – Town centre entertainment includes a Cineworld cinema, the Swan Theatre, a Mega Bowl bowling alley as well as numerous public houses, bars and clubs.
- **Other** – The centre provides a wide range of other (non A Class) town centre uses such as tattoo parlours, nail/beauty salons, tanning studios, dry cleaners, dentists, doctors surgery, hotels and a library. These attract footfall and provide valuable services to local people.

The convenience goods expenditure attracted to Yeovil town centre is £53.4 million in 2017 (Appendix 2), which is equivalent to 14.5% of the total convenience goods spending attracted to South Somerset District's stores and centres. The comparison goods expenditure attracted to Yeovil town centre is £314.16 million in 2017 (Appendix 3), equivalent to 68.5% of the total comparison goods spending in South Somerset District as a whole. Food and beverage expenditure attracted to Yeovil town centre is £90.86 million (Appendix 4), 57% of the total food and beverage spend within South Somerset District.

The combined turnover of Yeovil town centre is £458.42 million, split approximately 12% convenience goods trade, 68% comparison goods and 20% food and beverage. This indicates Yeovil town centre's broad shopping and leisure role.

[11] South Somerset Local Plan

Yeovil town centre is ranked 160th by Venuescore in 2016. By way of comparison the centre was ranked 170th in 2015, 154th in 2013 and 137th in 2010. This broadly shows that the centre has been getting progressively better over the past 7 years which is likely attributable to the opening of certain multiple retailers. The drop between 2015 and 2016 may be attributable to the closure of stores such as BHS and improvements in centres elsewhere. The minor fall in the rankings is not considered cause for alarm.

At the top of the hierarchy in the local area are the cities of Bristol (ranked 13th), Bath (ranked 19th) and Exeter (ranked 22nd) all of which influence shopping patterns across South Somerset District.

The regional centre of Taunton (ranked 90th) is at the next tier in the hierarchy and appears to be performing significantly better to the similarly sized and positioned Yeovil (160th) which is by far the best performing centre in the District.

The second best performing centre in South Somerset is Chard (ranked 1,044th) with numerous centres outside the District, including Dorchester (217th), Clarks Village (363rd) and Wells (847th) which are all ranked significantly higher.

Mix of Uses and Retailer Occupation

Within Yeovil Town Centre (as defined by the adopted Local Plan) there are 373 Class A retail/service uses. The diversity of Class A uses present in the centre is set out in Table A.1, and the results are compared with the national average.

Table A.1 Yeovil Town Centre Use Class Mix by Unit

Type of Unit	Units 2010	Units 2016	% of Total Number of Units	
			Yeovil (%)	UK Average (%)
A1 – Comparison	156	127	34.0	33.4
A1 – Convenience	27	26	7.0	10.4
A1 – Service	121	40	10.7	13.0
A2 – Service		47	12.6	11.8
A3		33	8.8	9.5
A5		25	6.7	6.0
A4 pubs/bars		12	3.2	4.6
Vacant	43	63	16.9	11.2
Total	**352**	**373**	**100.0**	**100.0**

Source: Goad Plan Sept. 2016 UK Average for all town centres surveyed by GOAD and the SSDC Retail Study Update (GVA).

The proportion of Class A1 comparison units within the town centre is slightly above the GOAD national average whilst the proportion of Class A1 convenience units is significantly lower than the GOAD national average. Class A1 and A2 service uses are similar to the national average. The proportion of Class A3 uses is slightly below the national average as is Class A4 uses. Class A5 uses are slightly above the national average. The proportion of vacant units is 16.9% which is above the national average.

Whilst the proportion of convenience units is below average, the convenience goods offer is dominated by large units e.g. Tesco, Iceland and Farm Foods. Other supermarkets such as Asda, Morrison's and Lidl are represented outside the town centre boundary.

Retailer Representation

Yeovil has a good number of comparison shops (127) and the proportion of comparison goods is slightly above the GOAD national average. Table A.2 provides a breakdown of comparison shop units by category and compares to the GOAD national average. The multiple retailers are concentrated along the pedestrianised Middle Street and Vicarage Walk.

All of the GOAD plan categories are represented within the centre. The choice in some of the categories is limited such as 'China, glass, gifts and fancy goods' and 'DIY, hardware and homewares'. There is a good choice of clothing/footwear shops, electrical/gas/music/ photography and charity/second hand shops.

Table A.2 Yeovil town centre breakdown of comparison units by category

Type of Unit	Number of Units	% of Total Number of Units	
		Yeovil (%)	UK Average (%)
Clothing and footwear	30	23.6	24.5
Furniture, carpets and textiles	5	3.9	7.7
Booksellers, arts, crafts and stationers	7	5.5	5
Electrical, gas, music and photography	21	16.5	9.6
DIY, hardware and homewares	5	3.9	7.1
China, glass, gifts and fancy goods	5	3.9	7.5
Cars, motorcycles and motor accessories	2	1.6	0.5
Chemists, drug stores and opticians	11	8.7	10.9
Variety, department and catalogue	6	4.7	1.7
Florists, nurserymen and seedsmen	3	2.4	2.1
Toys, hobby, cycle and sport	7	5.5	5.5
Jewellers	8	6.3	5.2
Charity/second hand shops	13	10.2	9.6
Other comparison retailers	4	3.1	3.1
Total	**127**	**100.0**	**100.0**

Source: SSDC and GOAD

The number of multiple comparison retailers is considered good for a town of Yeovil's size. The multiple comparison retailers comprise:

Table A.3 Multiple Comparison Retailers

Animal	Ernest Jones	Monsoon	The Works
Argos	F Hinds	New Look	Topshop/Topman
Blacks	Game	Pandora	USC
Body Shop	H&M	Peacocks	Warren James
Boots	H Samuel	Poundland	Waterstones
Card Factory	HMV	Primark	WH Smith
Carphone Warehouse	JD Sports	Quiz	Wilkinsons
Clarks	Laura Ashley	River Island	
Clinton Cards	Magnet Kitchens	Superdrug	
Edinburgh Woollen Mill	Marks & Spencer	The Entertainer	

Source: Goad Plan Sept. 2016

Service Uses

Yeovil Town Centre has a good range of non-retail service uses, with a choice of providers across all of the GOAD categories, as shown in Table A.4. The proportion of banks/other financial services is higher than the national average, along with travel agents and estate agents. The number of pubs/bars and fast food/takeaways in the centre are also slightly above the national average, whilst the number of restaurants/cafes is slightly below the national average. The proportion of betting shops/casinos, hairdressers/beauty parlours and laundries/dry cleaners is below the national average. Overall Yeovil has a good range and choice of services within the town centre.

Table A.4 Yeovil Town Centre Analysis of Selected Service Uses as at 2017

Type of Unit	Number of Units	% of Total Number of Units	
		Yeovil (%)	UK Average (%)
Restaurants/cafés	33	22.6	24.4
Fast food/takeaways	25	17.1	15.5
Pubs/bars	12	8.2	7.2
Banks/other financial services	21	14.4	11.5
Betting shops/casinos	4	2.7	3.9
Estate agents/valuers	17	11.6	9.7
Travel agents	5	3.4	2.3
Hairdressers/beauty parlours	27	18.5	23.4
Laundries/dry cleaners	2	1.4	2.1
Total	**146**	**100.0**	**100.0**
Other Non-Retail Services	11		
Total	**157**		

Source: Goad Plan Sept. 2016

The restaurants/cafes/bars offer has improved in recent years and there are a number of national chains represented within the town centre as shown in Table A.5. These chain outlets are supplemented by a range of independent restaurants/cafés/bars which provides a good balance. Lichfields considers that the range of national restaurants should be higher for a settlement the size of Yeovil and this sector could be improved further.

Table A.5 Chain restaurants/cafes/bars

Subway	Café Nero	Costa	Starbucks
Burger King	Frankie & Benny's	Pizza Hut	Ask Italian
Prezzo	Domino's Pizza	Beefeater	J D Wetherspoon

Source: Goad Plan Sept. 2016

The evening economy is supported by a number of bars, public houses, nightclubs, leisure and other entertainment attractions including:

Table A.6 Leisure and entertainment attractions

Cineworld Cinema	Megabowl	Swan Theatre	Nuffield Health Fitness & Wellbeing Gym
Octagon Theatre			

Source: Goad Plan Sept. 2016

Yeovil Market

A market takes place on Lower Middle Street every Tuesday and Friday (between 9am and 3pm) with additional markets around Christmas. The market provides a wide selection of goods including:

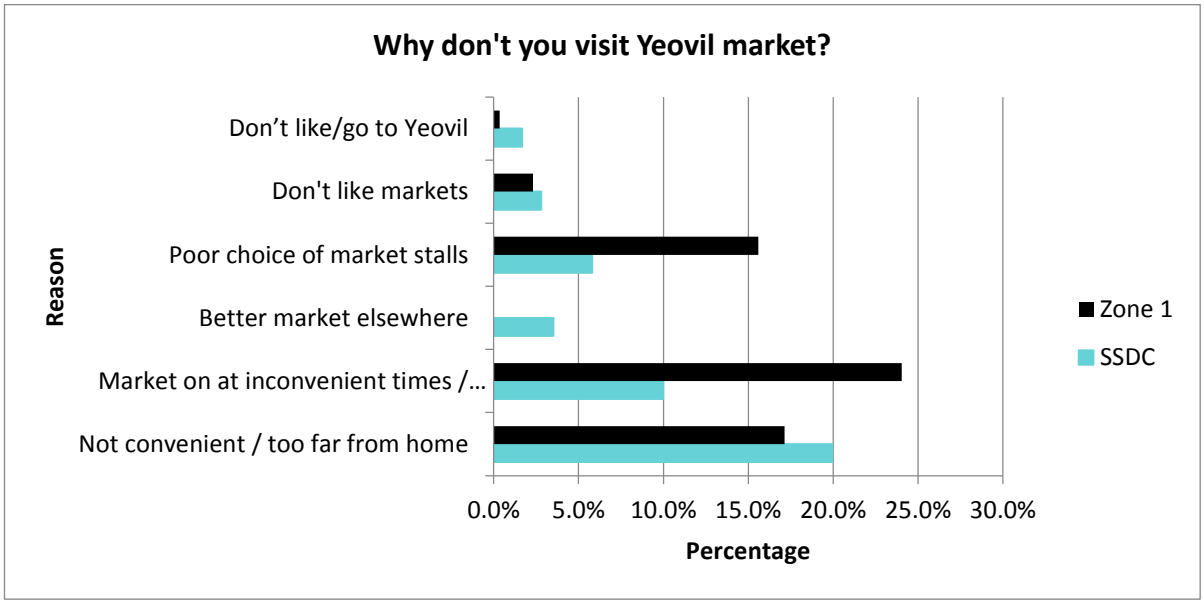
1 Local fruit and veg;
2 Local cheese, pies and pasties;
3 Local pickles, honeys, chutneys and eggs;
4 Slippers and socks;
5 Ladies & Gents fashion wear, children's clothes;
6 Curtain fabrics and foam;
7 Handmade Jewellery;
8 Knitting patterns and wool;
9 Pictures, china;
10 Watch repairs, key cutting;
11 Pet food and accessories; and,
12 Handbags, fashion accessories, new fabric for the home and much more

The market bring footfall into the town centre which in turn assists in providing spin off trade to the wider shops.

As part of the market research undertaken by NEMS, respondents were asked if they visit Yeovil Market. 81.7% of respondents stated that they never visited Yeovil Market with only 1.8% saying that they visited every week.

Respondents who never visit were asked why they didn't visit Yeovil market. 40.5% said that they didn't know or that there wasn't a particular reason and 11.4% said that they were unaware of the market. The other responses were as follows:

Figure A.1 Why don't you visit Yeovil Market?



Source: NEMS Market Research

It appears that Yeovil Market is not a big draw within the local area.

Characteristics of the Shopping Area

Yeovil town centre is spread over a large area. The primary shopping frontage runs along Middle Street and Vicarage Walk. Both of these shopping areas are pedestrianised. Middle Street appears to be the main shopping street with the Quedam Shopping Centre, along Vicarage Walk sitting behind Middle Street. The highest footfall was seen at the top of Middle Street at the juncture between Middle Street and High Street. Footfall was low along Vicarage Walk and towards the bottom of Middle Street.

Figure A.2 Vicarage Walk (Quedam Shopping Centre)

Source: Lichfields

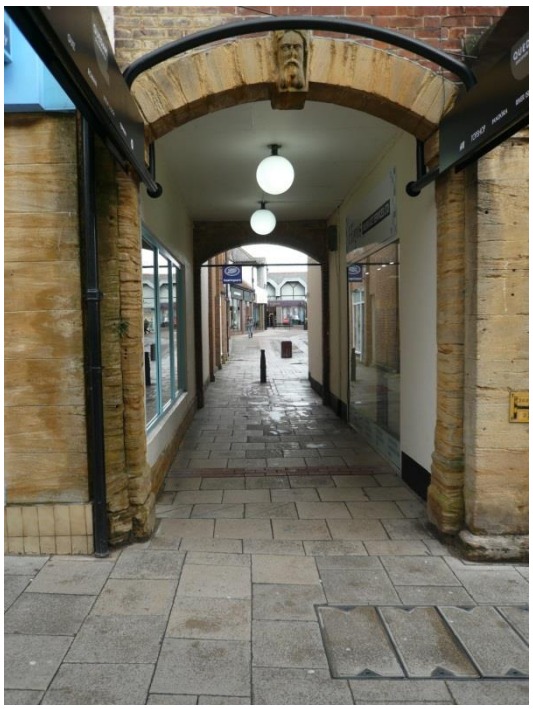
The shopping area was in a good condition with no sign of litter or vandalism. The pedestrianised nature of the shopping area meant that benches, trees, litter bins and other street furniture could be sited in the middle of the street. The street furniture is in good condition. The buildings are generally two and three storey.

Figure A.3 Street Furniture at Middle Street

Source: Lichfields

Pedestrian links between Middle Street and Vicarage Walk are via a well-lit and well surfaced walkway:

Figure A.4 Link between Middle Street and Vicarage Walk



Source: Lichfields

Yeovil town centre includes the Glovers Walk Shopping Centre which has an escalator link from the Quedam Shopping Centre. Glovers Walk is a dated shopping centre with a number of vacant units. Redevelopment of this centre could rejuvenate this part of the town centre.

Figure A.5 Escalator Link from Quedam Centre to Glovers Walk

Source: Lichfields

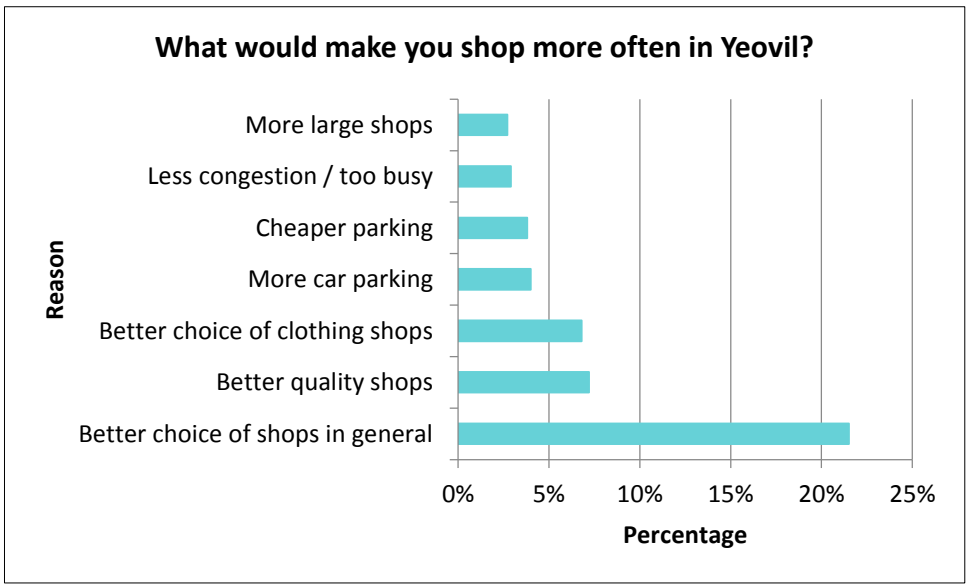
The shopping area slopes in generally a west to east direction. The walk up Middle Street is on a substantial gradient which may dissuade pedestrians from visiting the upper part of the centre.

The upper part of Middle Street and High Street is designated as a conservation area. The area was designated as a conservation area in 1983 and it was extended and amended in 2013.

Customer Views on Shops and Services

Respondents to the household survey were asked what would make them shop in Yeovil Town Centre more often. Of the respondents 51.5% stated that 'nothing' would make them shop in the town centre more often. Of the respondents who suggested improvements to the town centre, the majority mentioned better choice of shops and services and better quality of shops:

Figure A.6 What would make you shop more often in Yeovil?



Source: NEMS Market Research

These responses suggest that improvement to the range and choice of shops as well as the presence of larger shops would help improve the number of visitors to Yeovil town centre.

Supply and Quality of Commercial Premises

Based on SSDC's audit of units in January 2017 there are 63 vacant commercial units within the town centre. This represents 16.9% of the commercial units within Yeovil town centre. This is higher than the GOAD national average (11.2%).

Vacant units are dispersed throughout the centre but there is a pocket of vacant units in the Glovers Walk area of the town as well as on Vicarage Walk. The largest vacant unit is the former BHS unit (12 Ivel Square) which measures 2,500 sq. m gross.

Figure A.7 Former BHS store

Source: Lichfields

The number of vacant units within the Quedam Centre is a concern given that it is designated as primary shopping frontage.

Table A.7 Vacant Units at the Quedam Centre

Unit	Floorspace (gross)
Former BHS store, Quedam Centre	2,500 sq. m
5 Quedam Centre, Frederick Place	80 sq. m
39 Quedam Centre, Ivle Square	150 sq. m
Quedam Centre, Ivle Square	90 sq. m
6 Quedam Centre, Vicarage Walk	160 sq. m
11 Quedam Centre, Vicarage Walk	100 sq. m
12 Quedam Centre, Vicarage Walk	100 sq. m
18 Quedam Centre, Vicarage Walk	90 sq. m
19 Quedam Centre, Vicarage Walk	110 sq. m
21 Quedam Centre, Vicarage Walk	170 sq. m
29 Quedam Centre, Vicarage Walk	190 sq. m
31 Quedam Centre, Vicarage Walk	130 sq. m
32 Quedam Centre, Vicarage Walk	180 sq. m
37 Quedam Centre, Ivle Square	100 sq. m

Source: Goad Plan Floorspace

The former BHS store is being marketed for lease with an annual rent of £380,000. Business rates are £188,860 per annum. This area had a very low footfall and we would suggest that an operator is required for this unit in order to attract footfall back to this area of the town.

With the exception of this unit and the other vacant units in the Quedam Centre, the remaining vacancies within the centre are generally smaller units of less than 100 sq. m.

Zone A retail rents vary significantly throughout the centre, as shown in Table A.8 below. The most expensive units are located in the Quedam Shopping Centre and Middle Street with the cheapest units located at Glovers Walk.

Table A.8 Yeovil Town Centre Zone A Rents

Location	£ per sq. m
Vicarage Walk (Quedam Shopping Centre)	525 - 900
Middle Street	200 - 900
High Street	100 - 600
Glovers Walk	100 - 180

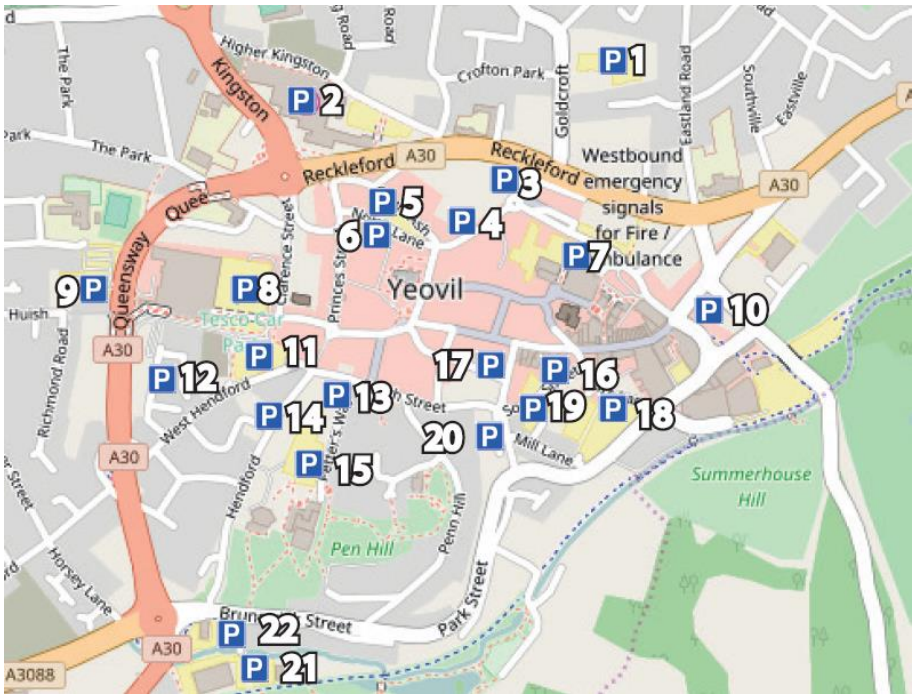
Source: Valuation Office Agency Business Rates (2010), accessed February 2017

Accessibility and Movement

There is a choice of car parks within the town centre, as indicated in Section 7 of this report. There are 15 council owned public car parks providing around 1,400 spaces. Other privately operated car parks including the Quedam Shopping Centre and Tesco Extra provide a further 1,900 spaces. These parks are distributed around the town centre and are conveniently located near the main shopping area. The locations of the car parks are shown below. The centre is well served by buses with Yeovil town centre located adjacent to Glovers Walk and the Quedam Shopping Centres. Services run from here to local destinations as well as destinations further afield such as Taunton (service 54) and Wells (service 77).

However the nearest train station is Yeovil Pen Mill which is approximately 1km from the town centre. Yeovil Pen Mill provides services to Weymouth in the south and Bristol in the north. Yeovil Junction is poorly connected to the town centre.

Figure A.8 Location of Yeovil's car parking



Source: Vectos Transport Planning

The Catchment Area

Comparison

The household survey results indicate that Yeovil's market share of comparison goods expenditure within the study area is 39%. The other main attractors were Taunton (11%) and Street/Glastonbury (8%).

Yeovil town centre's market share across the household survey area zone is:

1 Zone 1 (57.5%);

2 Zone 2 (45.7%);

3 Zone 3 (42.6%);

4 Zone 4 (50.1%);

5 Zone 5 (23.8%);

6 Zone 6 (11.3%);

7 Zone 7 (28.8%);

8 Zone 8 (44.2%); and,

9 Zone 9 (13.4%).

This suggests that Yeovil is a popular destination for comparison shopping for residents of Zones 1 (Yeovil Area), 2 (Wincanton Area), 3 (Somerton/Langport Area), 4 (Crewkerne Area), 5 (Ilminster Area), 7 (Beaminster Area) and 8 (Sherborne Area) with Yeovil being less popular for residents of Zones 6 (Chard Area) and 9 (Glastonbury Area). This is explained as Zone 9 (Glastonbury Area) is closer to Bridgwater and Wells whilst Zone 6 (Chard Area) is closer to Taunton which is a larger settlement and one that is ranked higher in retail terms by Venuescore.

Strengths

- The large Tesco Extra store acts as an important anchor store and provides main and bulk food shopping facilities. There are reasonable pedestrian links between Tesco and the primary shopping area.
- Good range of multiple retailers present in the town centre.
- There is a range of service facilities, including banks, building societies, estate agents and travel agents.
- Main shopping streets are pedestrianised.
- The centre has are number of public and private car parks distributed around the centre, within close proximity to the main shopping areas, although the usage of these car parks and the availability of spaces varies significantly.

Weaknesses

- The choice of food and grocery shopping could be improved. It is currently dominated by the Tesco store.
- The vacancy rate is higher than the national average and there are prominent vacant units within key areas of the Quedam Shopping Centre including the former BHS store.
- High proportion of vacant units within Glovers Walk Shopping Centre.
- Limited occupier demand from high quality operators.

- Limited size of units and lack of units to attract modern retailers.
- Glovers Walk Shopping Centre in need of modernisation.
- The evening economy has improved but there is further scope to improve the quality of the restaurant offer.
- Rail connections to the town centre are poor, which may impact on the commuter/office sectors to a greater extent than shopping.

Opportunities

- There is potential to accommodate development on some of the town centre car parks.
- Potential modernisation of Glovers Walk Shopping Centre to provide larger modern units, potentially including an element of residential/office use.
- Potential development of the Cattle Market site to provide either a large format retail store or a mixed use development with retail frontage onto Market Street.
- Potential redevelopment of the edge of centre Olds Garage site for a small/medium scale retailer.
- Potential redevelopment of the Box Factory/Stars Lane for a small/medium scale retailer.
- Business rates revaluation providing opportunities for small retailers to occupy town centre units.

Threats

- Continued lack of operator demand, particularly from the food and beverage sector.
- Planning applications for out of centre retail schemes such as the Bunford Business Park Sainsbury's site.
- Strengthening and expansion of out of centre comparison goods shops (for example Peel Centre, Babylon Hill and Houndstone Retail Park) proving to be an increasing threat to the viability of town centre comparison shops. Certain shops such as Next and JJB Sports have in the past closed town centre shops and relocated them to Babylon Hill. Out of centre sites are proving to be more attractive than the town centre.
- Prolonged vacancy for key units such as the former BHS store.
- Competition from other nearby settlements such as Taunton, Dorchester, Sherborne and further afield in Exeter and Bristol.

B. Chard Town Centre

Chard is designated as a Market Town in the adopted SSDC Local Plan (March 2015). Chard is located to the west of South Somerset, close to the Devon and Dorset borders. It is South Somerset's second largest town. The town is closely linked to the regional trunk road, the A303, and the A30 and A358.

It has a modest range of retail and service uses, and primarily functions as a day to day shopping and service centre for local residents. Its key roles include:

- **convenience shopping** – the main food store is the edge-of-centre Tesco supermarket on Tapstone Road (1,854 sq. m net). In the town centre, there are a number of other food stores including, Lidl (871 sq. m net), Sainsbury's (996 sq. m net) and a number of other smaller convenience shops.
- **comparison shopping** – there is a limited range of comparison goods retailers within the centre, comprising predominantly independent retailers with a few national multiples.
- **services** – there are a variety of service uses, including, a post office, estate agents, hairdressers, accountants, restaurants and solicitors.
- **entertainment/leisure** – this is limited to a social club, public houses and restaurants.
- **other uses** – there are other (non A Class uses) such as a dry cleaner, tattoo studio, dentists, osteopath, hotels and offices that assist in providing a valuable town centre offer.

The strategic approach to development in Chard is underpinned by the Chard Regeneration Plan (2009). This provides a means to guide the regeneration and growth of the town. The Plan identifies where growth and regeneration should occur and provides a toolkit of framework plans and design codes to guide change to deliver the vision.

The household shopper survey (Appendix 6) provides an indication of the role of Chard. 2.3% of respondents within the study area as a whole suggested they do most of their non-food shopping in Chard Town Centre with most respondents doing their non-food shopping in Yeovil (47.5%) and Taunton (11.1%).

The convenience goods expenditure attracted to Chard Town Centre is £45.95 million in 2017 (Appendix 2), which is equivalent to 12.5% of the total convenience goods spending attracted to South Somerset District stores and centres. The comparison goods expenditure attracted to Chard Town Centre is £16.95 million in 2017 (Appendix 3), equivalent to 2.1% of the total comparison goods spending in South Somerset District as a whole. Food and beverage expenditure attracted to Chard Town Centre is £10.72 million (Appendix 4), 6.7% of the total food and beverage spending within South Somerset District.

The combined turnover of Chard Town Centre is £73.62 million, which is approximately 16% of Yeovil Town Centre's turnover. Chard's turnover is split approximately 62% convenience goods trade, 23% comparison goods and 15% food and beverage. This split reflects Chard's lower order shopping and service role when compared with Yeovil. Javelin's Venuescore rank for Chard is 1,044th in 2016, which is the second best performing centre in South Somerset.

Mix of Uses and Retailer Representation

Within Chard Town Centre (as defined by the adopted Local Plan) there are 120 Class A retail/service uses. The diversity of Class A uses present in the centre is set out in Table B.1, and the results are compared with the national average.

Table B.1 Chard Use Class Mix by Unit

Type of Unit	Number of Units 2010	Number of Units 2017	% of Total Number of Units	
			Chard (%)	UK Average (%)
A1 – Comparison	52	36	30.0	33.4
A1 – Convenience	12	13	10.8	10.4
A1 – Service	43	24	20.0	13.0
A2 – Service		19	15.8	11.8
A3		7	5.8	9.5
A5		6	5.0	6.0
A4 pubs/bars		2	1.7	4.6
Vacant	19	13	10.8	11.2
Total	**126**	**120**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad (January 2017) and the SSDC Retail Study Update (GVA)

The centre has a lower number of comparison units when compared with the national average. The centre has a slightly higher than average number of convenience units. Consistent with its role as a market town, Chard has a significantly above average proportion of A1 and A2 services, but below average proportions of A3/A4/A5 units when compared with the national average.

Chard has a below average proportion of vacant units when compared with the national average.

Vacant Units and Property Indicators

There were 13 vacant units within Chard (January 2017), a vacancy rate of 10.8%, which is below the national average of 11.2%. This indicates a balance between the supply and demand for premises.

Zone A retail rents range from £125 to £250 per sq. m, which is slightly higher than levels achieved in Crewkerne, Ilminster and Wincanton.

Chard's Markets

Chard holds three annual fairs and a weekly market on Saturdays. The market is comprised of a variety of stalls ranging from fruit and vegetables, meat, fish and other non-produce items such as clothing and carpets.

The Council also manages a Thursday Antiques Market which started up in 1967 and continues to operate.

Characteristics of the Shopping Area

The adopted Local Plan defines the Primary Shopping Area and Town Centre boundaries of Chard around High Street, Holyrood Street, Boden Street, Silver Street and Fore Street. Within this area, there is a defined Primary Shopping Frontage, which includes part of Fore Street and the northern part of Holyrood Street.

The majority of Chard Town Centre is included within a Conservation Area, and there is a mix of building types and architectural styles. Within the Conservation Area, there is a high quality historic environment. There are variations in local topography within the town centre, particularly the gradient up Fore Street and High Street to Snowdon Hill.

The Town Centre provides a relatively attractive environment and pedestrian movement along Fore Street is good. There are a number of public car parks in close proximity to the Primary Shopping Area, which allows easy access for shoppers. As recognised in the Local Plan, opportunities for enhancement exist in the Boden Mill area; however it is unclear whether there is developer appetite for the development of this area or whether any development would be viable

Figure 8.1 Boden Mill Area

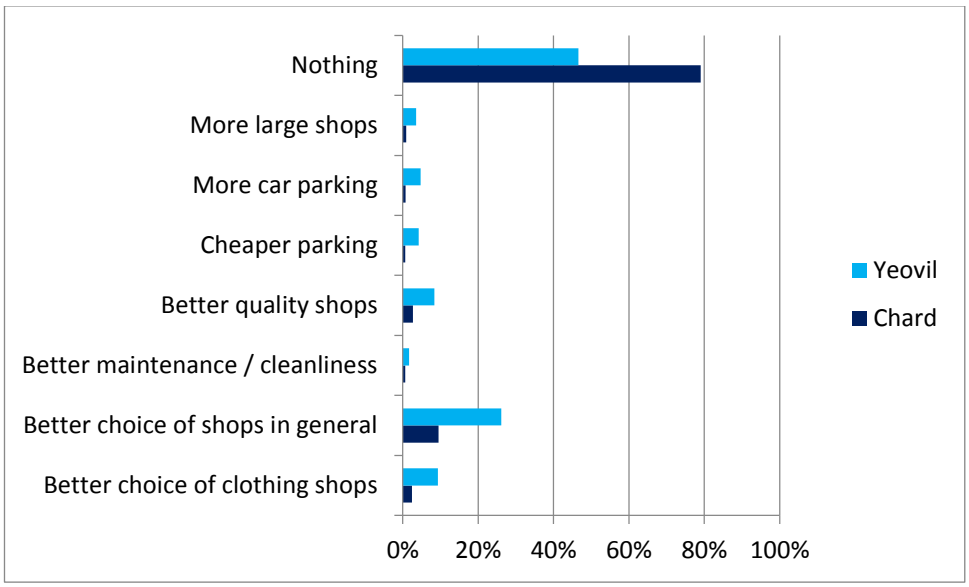
Source: Lichfields

Views of Customers

Respondents to the household survey were asked what would make you shop more often in Chard Town Centre. A high proportion of the respondents (79%), suggested nothing would make them shop in Chard more often. This is probably due to Chard's limited size and the distance to the centre for many residents across the study area.

Figure B.1 below shows the main responses to the question, compared to the same question for Yeovil Town Centre.

Figure B.1 What would make you shop more often in Chard Town Centre?



Source: NEMS Household Survey, February 2017

Of the limited number of respondents who suggested improvement for Chard (282 out of 1075 people), the key results were:

- Better choice of shops in general (9.5%)
- Better quality shops (2.7%)
- Better choice of clothing shops (2.4%)

Accessibility and Movement

A significant proportion of the household survey respondents' travel by car for their food and non-food shopping, with 90% of respondents travelling by car as a driver or passenger for their main food shopping and 92% for their non-food shopping.

There is a choice of car parks within the town centre including:

- Marketfield (77 spaces)
- Boden Street (66 spaces)
- Coombe Street (29 spaces)
- Minnows (40 spaces)
- Bath Street (126 spaces)
- Essex Close (102 spaces)
- Crowshute (72 spaces)
- Tesco (360 spaces - customers only)

These car parks are distributed around the town centre and are conveniently located near the main shopping area.

The town is served by a number of hourly local bus services, linking the town to Axminster, Taunton and Ilminster. There are also more limited services to Yeovil and Dorchester. Pedestrian access in and around the town centre is reasonably good, with relatively wide

pavements along Fore Street. The pavement areas along Holyrood Street are however narrower, which can constrain pedestrian movement.

The Catchment Area

The household survey results indicate that Chard's market share of convenience goods expenditure within the study area is about 8%. The market shares for comparison goods expenditure and food/beverage expenditure are only 2% and 4% respectively. The draw is localised, with the majority of visitors from Zone 6 - Chard, indicating that Chard Town Centre has a limited local catchment area.

Chard's Strengths, Weaknesses, Opportunities and Threats

Strengths

- The centre meets a localised retail and service need particularly within Zone 6 (Chard Area). The centre has a mix of convenience and lower order comparison shopping and services.
- The proportion of vacant units is below the national average, suggesting reasonable demand for units.
- There are a number of convenient and public car parks located in close proximity to the Town Centre.
- The Centre is an attractive market town, with a number of historic buildings.

Weaknesses

- The centre has a relatively poor higher order comparison offer, attracting a limited market share of comparison goods spending within Somerset District.
- The centre has a low proportion of national multiple retailers.
- The town centre has a below average proportion of restaurants, public houses and bars.
- High Street and Fore Street are congested with vehicles, which can create conflict with pedestrians and can detract from the overall shopping environment.
- Despite being in the Primary Shopping Area, the Sainsbury's store doesn't have a frontage onto Holyrood St. This impact on the attractiveness and vibrancy of Holyrood St as there is a large dead frontage.
- There are no defined public spaces.

Opportunities

- Chard has major development opportunities as promoted through the Chard Regeneration Framework, including the Boden Mill area which could provide additional retail floorspace.
- Improvements to Chard's leisure offer may increase visitors within the centre which in turn will offer opportunity for an increased food and beverage uses within the centre and increase expenditure elsewhere.

Threats

- The continued polarisation of investment within larger centres may limit operator demand for new premises in Chard. Lower commercial values may affect the viability of regeneration proposals.

C. Crewkerne Town Centre

Crewkerne is designated as a Market Town in the adopted SSDC Local Plan (March 2015). Crewkerne is the third largest settlement in South Somerset, following Yeovil and Chard. It is located in the south west of the district, close to the county boundary with Dorset, on the intersection of the A30 (London to Exeter) and A356 (Martock to Dorchester). It is 14km south west of Yeovil and 11km east of Chard.

Crewkerne has a modest range of retail and service uses, and acts as a strong functional service centre for the surrounding area. Its key roles include:

- **convenience shopping** – the largest food store is Waitrose (1,572 sq. m net), and other stores include Lidl (707 sq. m net) and a number of other smaller convenience shops. A Bugden's store closed in early 2017.
- **comparison shopping** – there is a range of comparison goods retailers within the centre, albeit there is a relatively high number of charity shops and very few national multiples.
- **services** – there are a variety of service uses, including hairdressers, accountants, restaurants and solicitors.
- **Other uses** – the Crewkerne Aqua Centre is located within the Town Centre, and there is also a library. There is a museum and a martial arts facility. Other non A Class uses include a laundrette, beauty salon, dentist, offices and a hotel. These attract people to the centre and provide a valuable local facility.

The household shopper survey (Appendix 6) provides an indication of the role of Crewkerne. Less than 1% of respondents within the study area as a whole suggested they do most of their non-food shopping in Crewkerne Town Centre.

The convenience goods expenditure attracted to Crewkerne Town Centre is £25.97 million in 2017 (Appendix 2), which is equivalent to 7% of the total convenience goods spend attracted to South Somerset District stores and centres. The comparison goods expenditure attracted to Crewkerne Town Centre is £6.52 million in 2017 (Appendix 3), equivalent to 1.4% of the total comparison goods spending in South Somerset District as a whole. Food and beverage expenditure attracted to Crewkerne Town Centre is £2.77 million (Appendix 4), 1.7% of the total food and beverage spending within South Somerset District.

The combined turnover of Crewkerne Town Centre is £35.26 million. Crewkerne's turnover is split approximately 74% convenience goods trade, 18% comparison goods and 8% food and beverage. This split reflects Crewkerne's lower order shopping and service role when compared with Yeovil. Javelin's Venuescore rank for Crewkerne is 1,559th in 2016, which is the third best performing centre in South Somerset.

Mix of Uses and Retailer Representation

Within Crewkerne Town Centre (as defined by the adopted Local Plan) there are 98 Class A retail/service uses. The diversity of Class A uses present in the centre is set out in Table C.1 and the results are compared with the national average.

The centre has a higher number of comparison units when compared with the national average. The centre has a higher than average number of convenience units. Consistent with its role as a market town, Crewkerne has a significantly above average proportion of A1 and A2 services, but below average proportions of A3/A4/A5 units when compared with the national average.

Table C.1 Crewkerne Use Class Mix by Unit

Type of Unit	Number of Units 2010	Number of Units 2017	% of Total Number of Units	
			Crewkerne %	UK Average %
A1 – Comparison	32	35	35.7	33.4
A1 – Convenience	10	11	11.2	10.4
A1 – Service	40	14	14.2	13.0
A2 – Service		19	19.3	11.8
A3		7	7.1	9.5
A5		3	3.0	6.0
A4 pubs/bars		4	4.0	4.6
Vacant	15	5	5.1	11.2
Total	**97**	**98**	**100**	**100**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad (December 2016) and the SSDC Retail Study Update (GVA)

Crewkerne holds a farmers market on the third Saturday of each month, outside the Henhayes Centre on South Street.

Crewkerne has a below average proportion of vacant units when compared with the national average. The number of vacant units has reduced significantly from 15 in 2010.

Vacant Units and Property Indicators

There were 5 vacant units within Crewkerne (January 2017), a vacancy rate of 5.1%, which is below the national average of 11.2%. This indicates a balance between the supply and demand for premises.

Zone A retail rents range from £120 to £215 per sq. m, which is slightly higher than levels achieved in Wincanton but slightly below Chard and Crewkerne.

Characteristics of the Shopping Area

The adopted Local Plan defines the Primary Shopping Area and Town Centre boundaries of Crewkerne around Market Street, Market Square, Falkland Square, the George Shopping Centre, the southern part of North Street, the western part of East Street and the eastern part of Church Street. Within this area, there is a Primary Shopping Frontage, which includes Market Street, Falkland Square and the George Shopping Centre.

The majority of Crewkerne Town Centre is included in a Conservation Area, which was first designated in 1973. The Conservation Area includes over 140 Listed Buildings and there is a mix of building types and architectural styles. Within the Conservation Area, there is a high quality historic environment with the older core centred around Market Square.

Overall, Crewkerne has an attractive historic environment which appears to be well maintained. The post-war Falkland Square area however is less attractive than the historic buildings along Market Street, albeit it provides a reasonable shopping environment.

There is a one way system through the town centre which appears heavily congested with vehicles, creating conflict with pedestrians and detracting from the overall shopping environment. The conflict between vehicles and pedestrians is particularly apparent around the Market Square area. Notwithstanding this, the pedestrian movement along Market Street and around the George Shopping Centre/Falkland Square is good, and is enhanced by the presence of a Waitrose Supermarket to the east of the Primary Shopping Area.

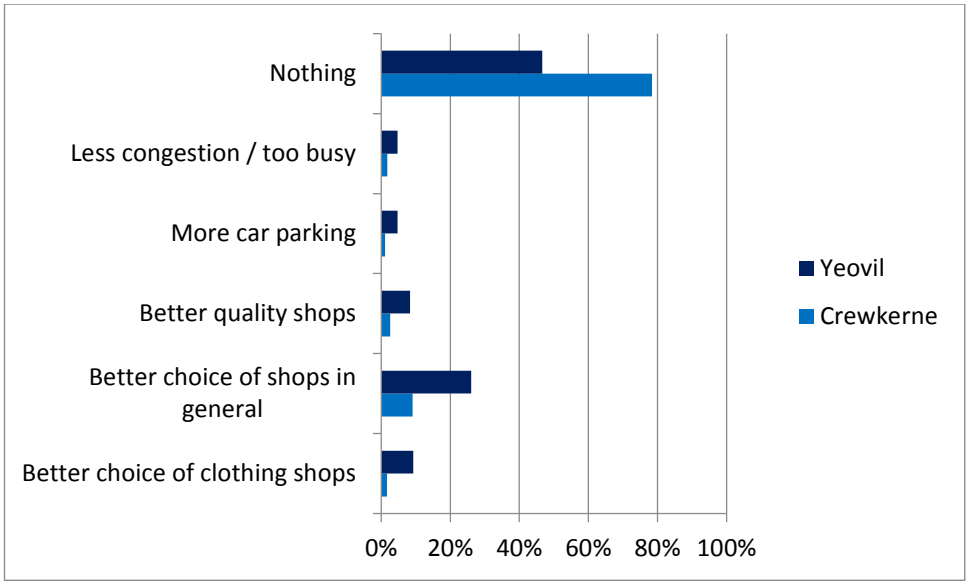
There is limited public realm along Market Street; however the Falkland Square area provides a number of public benches and landscaping. There are a number of public car parks in close proximity to the Primary Shopping Area, which allows easy access for shoppers.

Views of Customers

Respondents to the household survey were asked what would make you shop more often in Crewkerne Town Centre. A high proportion of the respondents (78%), suggested nothing would make them shop in Crewkerne more often. This is probably due to Crewkerne's limited size and the distance to the centre for many residents across the study area.

Figure C.1 below shows the main responses to the question, compared to the same question for Yeovil Town Centre.

Figure C.1 What would make you shop more often in Crewkerne Town Centre?



Source: NEMS Market Research January 2017

Of the limited number of respondents who suggested improvement for Crewkerne (267 out of 1054 people), the key results were:

- Better choice of shops in general (9.9%)
- Better quality shops (2.6%)
- Better choice of clothing shops (1.6%)
- Less congestion (1.7%)

Accessibility and Movement

A significant proportion of the household survey respondents' travel by car for their food and non-food shopping, with 88% of respondents travelling by car as a driver or passenger for their main food shopping and 90% for their non-food shopping.

There is a choice of car parks within the town centre including:

- West Street (71 spaces)
- South Street 1 (Waitrose - 273 spaces)
- South Street 2 (Lidl - 60 spaces)

- Market Square (5 spaces)

These car parks are distributed around the town centre and are conveniently located near the main shopping area.

Crewkerne benefits from a number of frequent bus services to Yeovil and Chard, with several trips a day. The household survey results demonstrate that 3.3% of respondents travel by bus to do their non-food shopping and 0.5% to do their food shopping. Crewkerne also benefits from a railway station, which is located approximately 1.7km to the south east of the town centre. The station connects directly to London Waterloo and Exeter, with an hourly service to both. However, the household survey confirmed that no respondents travelled by train to do their food or non-food shopping.

Pedestrian access in and around the town centre is reasonably good, with relatively wide pavements along Market Street and a pedestrianised area in the George Shopping Centre and the Falkland Square area. Pedestrian movement can be constrained around the Market Square area, where there is a conflict between vehicular and pedestrian movement.

The Catchment Area

The household survey results indicate that Crewkerne's market share of convenience goods expenditure within the study area is about 8%. The market shares for comparison goods expenditure and food/beverage expenditure are less than 1%. The majority of visitors are from Zone 4 (Crewkerne Area), however the next highest number of visitors were attracted from Zone 7 (Beaminster Area), indicating that Crewkerne Town Centre attracts visitors from outside of South Somerset District.

Crewkerne's Strengths, Weaknesses, Opportunities and Threats

Strengths

- The centre meets retail and service needs particularly within Zone 4 (Crewkerne Area) and its catchment also extends outside the District, into West Dorset. The centre has a mix of convenience and lower order comparison shopping and services.
- The centre provides a higher than average level of comparison units, however there are a relatively high number of charity shops and very few national multiples.
- The proportion of vacant units is below the national average, suggesting reasonable demand for units.
- There are a number of convenient public car parks located in close proximity to the Town Centre.
- The Centre is an attractive market town, with a number of historic buildings.

Weaknesses

- The centre has a relatively poor higher order comparison offer, attracting a limited market share of comparison goods spending within the South Somerset District.
- The centre has a low proportion of national multiple retailers.
- The town centre has a below average proportion of restaurants, public houses and bars.
- There is conflict in the Market Square area between vehicles and pedestrians which can detract from the overall shopping environment.

Opportunities

- The Waitrose is a key anchor to the centre which may attract more national multiple retailers to complement the retail offer within the centre.
- Opportunity for the quality of Falklands Square and George Shopping Centre to be further enhanced.

Threats

- The continued polarisation of investment within larger centres may limit operator demand for new premises in Crewkerne. Lower commercial values may affect the viability of regeneration proposals.

D. Ilminster Town Centre

Ilminster is designated by Policy EP9 of the Local Plan as a 'Market Town' in retail terms. This is second only to Yeovil in the retail hierarchy. The Local Plan states that Ilminster, alongside the other market towns, functions as an important service centre, providing a range of facilities and services for an extensive rural catchment area.

The Local Plan states that Ilminster is the fifth largest settlement in South Somerset with a population of approximately 4,499 people. This population has grown considerably in recent years, reflected in the fact that in seven years (2001-2008) the number of people living in the town increased by almost 20%. The Local Plan states:

"In retail terms, the centre is healthy and includes a range of national retailers, including a large supermarket which opened in 2007."

The convenience goods expenditure attracted to Ilminster Town Centre is £18.5 million in 2017 (Appendix 2), which is equivalent to 5% of the total convenience goods spending attracted to South Somerset District stores and centres. The comparison goods expenditure attracted to Ilminster Town Centre is £7.68 million in 2017 (Appendix 3), equivalent to 1.7% of the total comparison goods spending in South Somerset District as a whole. Food and beverage expenditure attracted to Ilminster Town Centre is £3.82 million (Appendix 4), 2.4% of the total food and beverage spending within South Somerset District.

The combined turnover of Ilminster Town Centre is £30 million, which is approximately 1.8% of SSDC's turnover in 2017. Ilminster's turnover is split approximately 62% convenience goods trade, 25% comparison goods and 13% food and beverage. This split reflects Ilminster's lower order shopping and service role when compared with other settlements in the District such as Yeovil. Javelin's Venuescore rank for Ilminster is 3,133th in 2016.

Lichfields consider that the town includes a good selection of retail and service uses and its key roles include:

- **Convenience Shopping** – The centre benefits from a Tesco superstore (2,781 sq. m gross) and a Co-operative Food store (965 sq. m gross). These main stores are supported by a 278 sq. m gross McColl's convenience store and small independent shops.
- **Comparison Shopping** – The centre has a good comparison goods offer for a centre of its size. Most of these are independent shops but Boots and Peacocks (part of Co-op) are present.
- **Services** – The centre has a good service offer for a centre of its size. This includes two national banks (Lloyds and NatWest), four estate agents, three accountants and two solicitors. There are five hairdressers and there is also a post office.
- **Entertainment** – Evening entertainment is limited The Retreat Brasserie and Wine Bar, two public houses (The Dolphin and The George) and two Indian restaurants.
- **Other Uses** – There are offices, a dentist, a veterinary surgery and a dry cleaners in the centre. These uses are considered to be valuable to the local community and attract footfall to the centre.

The household survey results confirmed that only 3.2% of the study area carried out their main or top up food shopping in Ilminster. 37.5% of the people within Zone 5 (Ilminster Area) carried out their main food shopping in the Tesco Superstore.

Only 0.2% of the study area carried out their non-food shopping in Ilminster.

Ilminster is ranked 3,133rd in the 2016/2017 Venuescore rankings. This is equal with Chard but below Yeovil (143rd), Crewkerne (1,559th) and Wincanton (2,377th).

Mix of Uses and Retailer Occupation

Within Ilminster town centre (as defined by the adopted Local Plan) there are 69 Class A units. The diversity of Class A uses present in the centre is set out in Table D.1 and the results are compared with the national average:

Table D.1 Breakdown of Town Centre Uses

Type of Unit	Units 2010	Units (Jan 2017)	% of Total Number of Units	
			Ilminster (%)	UK Average (%)
A1 – Comparison	27	30	43.5	33.4
A1 – Convenience	10	10	14.5	10.4
A1 – Service	17	7	10.1	13
A2 – Service		12	17.4	11.8
A3		5	7.2	9.5
A5		1	1.4	6
A4 pubs/bars		2	2.9	4.6
Vacant	3	2	2.9	11.2
Total	**57**	**69**	**100.0**	**100.0**

Source: SSDC Audit (January 2017), VOA Data 2017, UK average for all town centres surveyed by Goad Plans (December 2016) and the SSDC Retail Study Update (GVA)

The proportion of both comparison and convenience shops within Ilminster is significantly above the national average. The proportion of A1 service units is below the national average whilst the proportion of A2 units is significantly above the national average. Class A3/A4/A5 units are below the national average and surprisingly there is only one takeaway within the town although some of the restaurants also provide a takeaway service. There are only two vacant units within the centre which represents a vacancy rate of 2.9%, significantly below the national average. This shows that demand for units in the town is high.

Comparison Units

As previously stated Ilminster has a high proportion of comparison units within the town centre. The table below splits the comparison units into GOAD categories and compares the proportion of units with the national average:

Table D.2 Breakdown of comparison units

Type of Unit	Number of Units	% of Total Number of Units	
		Ilminster (%)	UK Average (%)
Clothing and footwear	9	31	24.5
Furniture, carpets and textiles	3	10.3	7.7
Booksellers, arts, crafts and stationers	2	6.9	5
Electrical, gas, music and photography	0	0	9.6
DIY, hardware and homewares	2	6.9	7.1
China, glass, gifts and fancy goods	2	6.9	7.5
Cars, motorcycles and motor accessories	0	0	0.5
Chemists, drug stores and opticians	3	10.3	10.9
Variety, department and catalogue	0	0	1.7

Florists, nurserymen and seedsmen	0	0	2.1
Toys, hobby, cycle and sport	0	0	5.5
Jewellers	1	3.4	5.2
Charity/second-hand	5	17.2	9.6
Other comparison retailers	2	6.9	3.1
Total	**29**	**100**	**100**

Source: SSDC Audit and GOAD national averages derived by Lichfields

Most of the GOAD categories are represented within the town centre with the exception of the following:

1 Electrical, gas, music and photography;

2 Cars, motorcycles and motor accessories;

3 Variety, department and catalogue;

4 Florists, nurserymen and seedsmen; and,

5 Toys, hobby, cycle and sport.

For a town of the size of Ilminster it would not be expected to have a variety, department or catalogue store. Even though there are a few gaps in the offer we consider that the comparison offer is good for a town of this size.

There is limited multiple retailers within the town centre. However we consider that this is not an issue because of the high quality of the independent offer.

Service Uses

There is a good number of service uses within the centre. This includes five hairdressers, four estate agents, two banks, three accountants, three solicitors and a dry cleaner. Gaps in provision include a travel agent and funeral director.

Leisure Uses

In terms of food and drink uses the offer is limited. The centre comprises three cafes, two restaurants, two public houses and one takeaway.

There is no cinema or concert hall within the town centre. Leisure uses are limited to the food and drink uses listed above as well as Ilminster Bowling and Tennis Club. A small weights gym is located outside the town centre boundary at Canal Way.

Vacant Units

There are only two vacant units within the centre which represents a vacancy rate of 2.9%, significantly below the national average. This shows that commercial units in Ilminster are popular. The former Gooch & Housego building is also vacant albeit not currently in a commercial use. This unit was the subject of a planning application for 14 residential units and 3 office/retail units.

Zone A retail rents range from £120 to £225 per sq. m, which is slightly higher than levels achieved in Wincanton and Crewkerne, but slightly below Chard.

Views of Customers

Respondents to the household survey were asked what would make you shop more often in Ilminster Town Centre. A high proportion of the respondents (82.5%), suggested nothing would

make them shop in Ilminster more often and 10.6% didn't know. This is probably due to Ilminster's limited size and the distance to the centre for many residents across the study area. Figure D.1 below shows the main responses to the question, compared to the same question for Yeovil Town Centre.

Figure D.1 What would make you shop more often in Ilminster Town Centre

Source: NEMS Market Research

Nature and quality of the retail environment

The town centre is small and linear in nature and commercial activity is focussed along two roads (Silver Street and East Street).

The vast majority of the town centre is located within the Ilminster Conservation Area. In addition there are a number of Listed Buildings within the town centre. St Marys Church is a Grade I listed building. As a result of the historic context the public realm is of a very high quality. Shopfronts are traditional in nature and well-kept with the fabric of many buildings made of stone ashlar. The retail area is concentrated around the main square which includes the Grade II Listed Market House monument which acts as a bus shelter and a location for the weekly market and the monthly produce market. Some car parking is also located here which provides easy access to the shops and services.

Figure D.2 Ilminster Town Centre

Source: Lichfields

The large number of high quality independent shops such as R. A. Dyer Drapers, Mikes Greengrocer and Bonners Butchers and Deli give the settlement character and provides the feel of a traditional English town centre. A Tesco Superstore was built in 2007 and this is linked to the town centre via a pedestrian walkway.

Figure D.3 Pedestrian link to Tesco Superstore

Source: Lichfields

Footfall appeared to be highest on East Street and Silver Street. The pedestrian link between Tesco and the town centre did not appear to be well used despite the relatively short distance between the two areas.

Accessibility and wayfinding

Ilminster is located approximately 30 minutes away from Yeovil by car. There is no train station within Ilminster. Bus stops are centrally located which provide services to Axminster via Chard, Crewkerne and Taunton. The journey time to Chard is approximately 24 minutes. Car parking is situated at the following locations:

Table D.3 Ilminster Car Parks

Name	Number of spaces	Cost
Tesco car park		Three hours free of charge
Orchard Vale	58 spaces	80p for 2 hours or £1.60 all day
West Street	41 spaces	80p for 2 hours or £1.60 all day
Shudrick Lane	41 spaces	80p for 2 hours or £1.60 all day

Source: Lichfields

Parking in the Council car parks is free after 6pm and on Sundays.

There is some on street parking along one side of Silver Street and East Street. The town centre is easily accessible from these car parks.

There is good signage at Tesco demonstrating how to reach the rest of the town centre.

Figure D.4 Signage at Tesco

Source: Lichfields

Ilminster's Strengths, Weaknesses, Opportunities and Threats

Strengths

- Good convenience offer comprising a Tesco superstore, Co-operative Food and McColl's as well as independent greengrocers, butchers and bakery.
- Good comparison offer including a wide range of clothing and footwear.
- High quality public realm comprising traditional timber shopfronts.
- Very low vacancy rate.
- Good range of service uses including two banks, four estate agents and three accountants.
- Good parking provision within and in close proximity to the town centre.

Weaknesses

- Lack of leisure uses within the town centre.
- Limited number of evening uses within the town centre.
- Lack of dedicated parking for the town centre Co-op.

Opportunities

- Re-use of the former Gooch & Housego building could provide additional retail frontage.
- Enhance the pedestrian walkway between Tesco and the town centre to increase footfall.

Threats

- Competing settlements of Chard and Taunton.

E. Wincanton Town Centre

Wincanton is designated as a Primary Market Town in the adopted SSDC Local Plan (March 2015). Wincanton is the fourth largest settlement in South Somerset District. Wincanton is situated in the east of the district, towards the north of the Blackmore Vale. The A303 defines the south edge of Wincanton and provides good road links to London and the south west of England. Wincanton lies approximately 14km north east of Yeovil.

Wincanton has a reasonable range of retail and service uses, and primarily functions as a day to day top up shopping and service centre for local residents. Its key roles include:

- **convenience shopping** – the main convenience retail provision is out-of-centre, comprising Morrison's (2,494 sq. m net) and Lidl (669 sq. m net). In the town centre, there is a Co-op (365 sq. m net) and a number of other smaller convenience shops.
- **comparison shopping** – there is a range of comparison goods retailers within the centre, albeit only one national multiple which is Boots.
- **services** – there are a variety of service uses, including hairdressers, a high street bank, estate agents and restaurants.
- **community facilities** – there is a library located within the town centre.
- **Other uses** – There are various other (non A Class) town centre uses in Wincanton such as offices, dentists, beauticians and a dog grooming business.

The household shopper survey (Appendix 6) provides an indication of the role of Wincanton. 1.2% of respondents within the study area as a whole suggested they do most of their non-food shopping in Wincanton Town Centre.

The convenience goods expenditure attracted to Wincanton (including the out of centre Morrison's store) is £45.84 million in 2017 (Appendix 2), which is equivalent to 12.4% of the total convenience goods spending attracted to South Somerset District's stores and centres. The comparison goods expenditure attracted to Wincanton is £8.75 million in 2017 (Appendix 3), equivalent to 1.9% of the total comparison goods spending in South Somerset District as a whole. Food and beverage expenditure attracted to Wincanton is £13.56 million (Appendix 4), 8.4% of the total food and beverage spending within South Somerset.

The combined turnover of Wincanton is £68.15 million. Wincanton's turnover is split approximately 67% convenience goods trade, 13% comparison goods and 20% food and beverage. This split reflects Wincanton's lower order shopping and service role when compared with Yeovil. Javelin's Venuescore rank for Wincanton was 2,377th in 2016, which is the fourth best performing centre in South Somerset.

Mix of Uses and Retailer Representation

Within Wincanton town centre (as defined by the adopted Local Plan) there are 74 Class A retail/service uses. The diversity of Class A uses present in the centre is set out in Table E.1 and the results are compared with the national average.

The centre has 1% below the national average of comparison units, and has a lower than average number of convenience units, although there is a large out-of-centre Morrison's Supermarket and a Lidl. It has a higher than average provision of Class A1 service units, but a lower than average provision of Class A2 service units when compared with the national average.

Table E.1 Wincanton Use Class Mix by Unit

Type of Unit	Number of Units 2010	Number of Units 2017	% of Total Number of Units	
			Wincanton 2017 %	UK Average %
A1 – Comparison	29	24	32.4	33.4
A1 – Convenience	7	6	8.1	10.4
A1 – Service	25	12	16.2	13.0
A2 – Service		6	8.1	11.8
A3		5	6.8	9.5
A5		2	2.7	6.0
A4 pubs/bars		5	6.8	4.6
Vacant	10	14	18.9	11.2
Total		**74**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017) and the SSDC Retail Study Update 2009 (GVA)

Wincanton has a significantly higher proportion of vacant units when compared with the national average. The number of vacant units has increased from 10 units in 2010.

Vacant Units and Property Indicators

There were 14 vacant units within Wincanton (January 2017), a vacancy rate of 18.9%, which is significantly above the national average of 11.2%. This indicates a lack of balance between the supply and demand for premises.

Zone A retail rents range from £110 to £195 per sq. m, which is slightly below Chard, Crewkerne and Ilminster.

Characteristics of the Shopping Area

The adopted Local Plan defines the Primary Shopping Area and Town Centre boundaries of Wincanton around High Street, Carrington Way, Market Place, the northern end of the B3081 and the eastern end of Mill Street. There is no defined Primary Shopping Frontage.

Wincanton Town Centre is included in a Conservation Area, which was first designated in 1973. The Conservation Area includes over 90 listed buildings. Wincanton has an attractive historic environment, with a range of building types. It is well maintained, however there are some lower quality, modern shopfronts present along High Street.

There is a relatively busy main road which runs through the town centre which can create conflict with pedestrians and detract from the overall shopping environment. This is heightened by the narrow pavements on both sides of High Street and Mill Street, which detract from ease of pedestrian movement. There are also a number of large signs and other clutter along the pavements.

There is limited public realm along High Street; however the Market Square area provides some benches, bins and planting. There are a number of public car parks in close proximity to the town centre boundary, which allows easy and convenient access for shoppers.

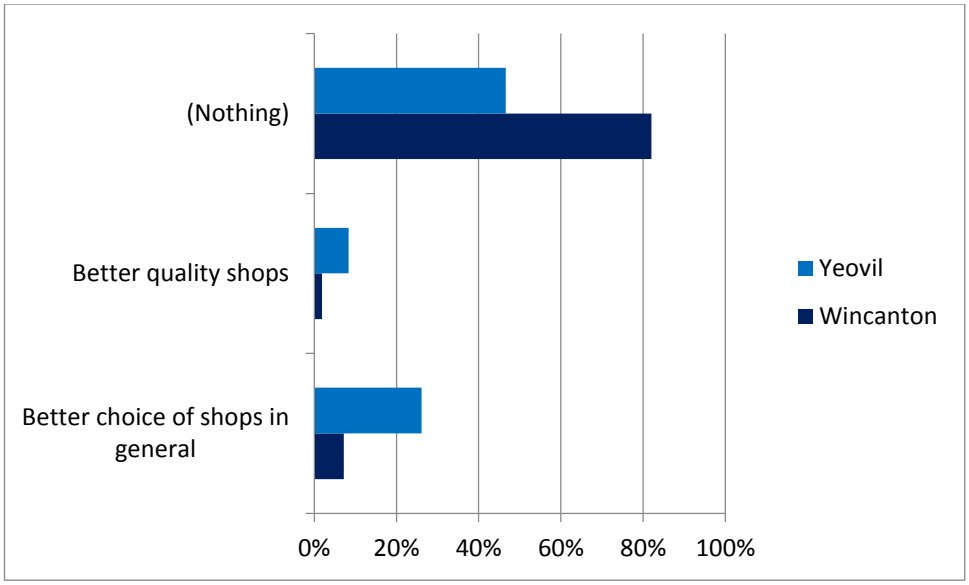
Views of Customers

Respondents to the household survey were asked what would make you shop more often in Wincanton town centre. A high proportion of the respondents (82%), suggested nothing would

make them shop in Wincanton more often. This is probably due to Wincanton's limited size and the distance to the centre for many residents across the study area.

Figure E.1 below shows the main responses to the question, compared to the same question for Yeovil Town Centre.

Figure E.1 What would make you shop more often in Wincanton Town Centre?



Source: NEMS Market Research January 2017

Of the limited number of respondents who suggested improvement for Wincanton (209 out of 1031 people), the key results were:

- Better choice of shops in general (7.2%)
- Better quality shops (1.9%)

Accessibility and Movement

A significant proportion of the household survey respondents' travel by car for their food and non-food shopping, with 95% of respondents travelling by car either as a driver or passenger for their main food shopping and 88% for their non-food shopping.

There is a choice of car parks close to the town centre including:

- Carrington Way (90 spaces)
- Memorial Hall (130 spaces)
- Churchfields (36 spaces)

These car parks are located outside the town centre boundary although remain only a short walk to the Primary Shopping Area.

Wincanton benefits from a number of frequent bus services to Yeovil, Shaftsbury and Taunton. There are also services to Street and Bruton and other smaller settlements, although these are much less frequent. The household survey results demonstrate that less than 1% of respondents travel by bus to do their non-food shopping and less than 0.5% to do their food shopping. Over 6% of respondents indicated they walk to do their non-food shopping and food shopping.

Pedestrian movement around Wincanton town centre can be constrained by a number of narrow pavements, particularly along Mill Street and parts of High Street. There are no

pedestrianised areas within the town centre, and pedestrian movement can be deterred by vehicular traffic along High Street, albeit there are a number of pedestrian crossing points.

The Catchment Area

The household survey results indicate that Wincanton's market share of convenience goods expenditure within the study area is about 8%. The market shares for comparison goods expenditure and food/beverage expenditure are only 1.1% and 4.9% respectively. The draw is localised, with the majority of visitors from Zone 2 (Wincanton Area), indicating that Wincanton town centre has a limited local catchment area.

Wincanton's Strengths, Weaknesses, Opportunities and Threats

Strengths

- The centre meets a localised retail and service need particularly within Zone 2 (Wincanton Area). The centre has a mix of convenience and lower order comparison shopping and services; however comprises mostly local independent retailers.
- There are a number of convenient public car parks located in close proximity to the town centre.
- The centre is a relatively attractive market town, with a number of historic buildings.

Weaknesses

- The centre has a poor higher order comparison offer, attracting a limited market share of comparison goods spending within the South Somerset District.
- The centre has a very low proportion of national multiple retailers.
- The centre has a high vacancy rate when compared with the national average. This vacancy rate has been increasing overtime.
- Mill Street and parts of High Street have narrow pavements, and the vehicular traffic through the town centre can deter pedestrian movement and detract from the overall shopping environment.

Opportunities

- Potential to extend retail/leisure offer on identified sites
- Improvements to the public realm and pedestrian environment may increase visitors to the area, which in turn may reduce vacancy rates and increase the comparison offer in the town centre.

Threats

- The continued polarisation of investment within larger centres may limit operator demand for new premises in Wincanton. Lower commercial values may affect the viability of regeneration proposals.

F. Ansford/Castle Cary District Centre

Ansford/Castle Cary is designated by Policy EP9 of the Local Plan as a District Centre. This is the third tier of settlement behind Yeovil and the Market Towns. The Local Plan states that the isolated nature of the town and its largely rural surroundings, results in it serving a more strategic service role than expected.

Mix of Uses and Retailer Occupation

Table F.1 Breakdown of uses within Ansford/Castle Cary

Type of Unit	Number of Units 2017	% of Total Number of Units	
		Ansford/Castle Cary (%)	UK Average (%)
A1 – Comparison	33	47.8	33.4
A1 – Convenience	7	10.1	10.4
A1 – Service	6	8.7	13.0
A2 – Service	8	11.6	11.8
A3	2	2.9	9.5
A5	3	4.3	6.0
A4 Pubs/Bars	3	4.3	4.6
Vacant	7	10.1	11.2
Total	**69**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017)

The centre (as defined by the adopted Local Plan) has a good range of comparison units including clothes shops, household goods shops, a book shop and an electrical goods shop. The proportion of comparison units at 47.8% is significantly above the national average. The only multiple retailer is Boots.

In terms of convenience units the offer is limited to smaller shops. There is no large supermarket within the town centre or elsewhere within the settlement.

Service uses comprise several hairdressers, four estate agents and one bank. Evening uses are limited to two restaurants, three public houses and three takeaways.

The vacancy rate at 10.1% is below the national average.

Nature and Quality of the Retail Environment

The town centre is within the Castle Cary conservation area and as a result the public realm is of a high quality. The commercial units are old in nature and comprise traditional timber shopfronts. They are well kept and many of the historic features have been retained. The streets are narrow and there is only limited on street parking. The centre is at a steep gradient.

Accessibility and Parking

Bus stops are located on Fore Street and provide links to Wincanton and Yeovil. A train station exists outside the town centre which provides links with Yeovil with journey times taking circa 14 minutes. There are two car parks serving the centre. Millbrook Gardens provides 85 spaces and Catherine's Close provides 36 spaces. There is only limited on street parking owing to the narrow streets in the town centre.

G. Langport/Huish Episcopi District Centre

Langport/Huish Episcopi is designated by Policy EP9 of the Local Plan as a District Centre. This is the third tier of settlement behind Yeovil and the Market Towns. The Local Plan states that tourism is important for the town with many small businesses being linked to providing facilities and attractions for visitors attracted by the opportunities to walk, cycle and ride horses in the Somerset Levels and Moors and particularly along the Parrett trail.

Mix of Uses and Retailer Occupation

Table G.1 Langport/Huish Episcopi Breakdown of Uses

Type of Unit	Number of Units 2017	% of Total Number of Units	
		Langport/Huish Episcopi %	UK Average %
A1 – Comparison	17	33.3	33.4
A1 – Convenience	7	13.7	10.4
A1 – Service	9	17.6	13.0
A2 – Service	6	11.8	11.8
A3	5	9.8	9.5
A5	4	7.8	6.0
A4 pubs/bars	1	2.0	4.6
Vacant	2	3.9	11.2
Total	**51**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017)

The centre (as defined by the adopted Local Plan) has a good range of comparison units, and is broadly consistent with the national average. The comparison offer is made up of independent and specialist stores, with the only national multiple being Boots. In terms of convenience units, there is a small supermarket in the centre, supplemented by a number of butchers and other food shops. A larger supermarket, Tesco Metro (850 sq. m net), is located to the edge of the centre. Service uses in the centre include several hairdressers and a post office. Food and drink uses are limited to a number of cafes, a restaurant, a number of takeaway's and one public house. The vacancy rate at 3.9% is significantly below the national average, suggesting the centre is healthy.

Nature and quality of the retail environment

The centre is within a Conservation Area and comprises a number of high quality, historic buildings and public realm. The commercial units are historic and comprise traditional timber shopfronts.

Accessibility and Parking

The centre benefits from a bus service to Yeovil (every 30 minutes), an hourly bus service to Taunton and more limited services to Bridgwater.

There is only limited on street parking owing to the narrow streets in the centre. There are a number of car parks located in close proximity to the centre:

- Town Square (22 spaces)
- Cocklemore East (33 spaces)
- Cocklemore West (117 spaces)

- Stacey's Court (27 spaces)

H. Somerton District Centre

Somerton is designated by Policy EP9 of the Local Plan as a District Centre. This is the third tier of settlement behind Yeovil and the Market Towns. The Local Plan states that the town is located in a rural setting alongside Landport/Huish Episcopi and Street and that it is important in serving the needs of residents in the rural north of South Somerset District.

Mix of Uses and Retailer Occupation

Table H.1 Somerton Breakdown of Uses

Type of Unit	Number of Units 2017	% of Total Number of Units	
		Percentage (%)	UK Average (%)
A1 – Comparison	26	32.4	33.4
A1 – Convenience	7	9.5	10.4
A1 – Service	8	10.8	13.0
A2 – Service	10	13.5	11.8
A3	5	6.8	9.5
A5	3	4.1	6.0
A4 Pubs/Bars	3	4.1	4.6
Vacant	14	18.9	11.2
Total	**74**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017)

The centre (as defined by the adopted Local Plan) has a reasonable range of comparison units including four clothes shops, a pharmacy, gift shop, stationary shop, kitchenware shop as well as a florist. There are a large number of charity shops and second hand/antique shops. These account for 6 of the 24 comparison units. The proportion of comparison units at 32.4% is only slightly below the national average. The only multiple retailer is Boots.

In terms of convenience units the offer is mainly limited to smaller shops. Williams Supermarket is the largest unit at 689 sq. m. There is no national supermarket within the town centre or elsewhere within the settlement.

Service uses comprise several hairdressers, three estate agents, three accountants, a solicitor and a bank. Evening uses are limited to two restaurants, three public houses and three takeaways.

The vacancy rate at 18.9% is considerably above the national average.

In the recent past some facilities and businesses have moved from the town centre to Somerton Business Park. This includes Somerton Town Council.

Nature and Quality of the Retail Environment

The town centre is within the Somerton Conservation Area. A number of units are listed buildings. As a consequence the public realm is of a high quality. The commercial units are old in nature and comprise traditional timber shopfronts. The streets are narrow and there is limited on street parking.

Somerton has one small purpose built shopping centre known as Brunel Shopping Centre which consists of both convenience and comparison units and is located off West Street.

There is public open space located in the area around Market Place. This provides areas for residents to sit and interact.

Accessibility and Parking

Bus stops are located at Market Place which provide links to Wells, Taunton and Yeovil. There are five car parks serving the centre. The largest is Paddock House which provides 56 spaces. On street parking can be found on Broad Street and around Market Place.

I. Bruton Local Centre

Bruton is designated by Policy EP9 of the Local Plan as a Local Centre. This is the fourth tier of settlement behind Yeovil, the Market Towns and District Centres. Bruton is classed as a Rural Centre.

Mix of Uses and Retailer Occupation

Table I.1 Bruton Breakdown of Uses

Type of Unit	Number of Units 2017	% of Total Number of Units	
		Bruton %	UK Average %
A1 – Comparison	12	36.4	33.4
A1 – Convenience	4	12.1	10.4
A1 – Service	4	12.1	13
A2 – Service	1	3.0	11.8
A3	3	9.1	9.5
A5	1	3.0	6.0
A4 pubs/bars	4	12.1	4.6
Vacant	4	12.1	11.2
Total	**33**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017))

The centre (as defined by the adopted Local Plan) has a good range of comparison units, 3% above the national average. The comparison offer is made up of independent and specialist stores, no national multiples. In terms of convenience units, there is a small Spar Shop (34 sq. m net) and a Premier (102 sq. m net), supplemented by an organic food shop and a wine shop. The provision of service uses in the centre is below the national average, and includes a number of hairdressers, an estate agent and a post office. There are a number of restaurants and public houses, and one takeaway.

The vacancy rate at 12.1% is slightly above the national average of 11.2%.

Nature and quality of the retail environment

The centre is within a Conservation Area which includes the historic core and much of the south western part of the settlement. The centre includes a number of high quality, historic buildings and public realm. The commercial units are historic and comprise traditional shopfronts.

Accessibility and Parking

The centre benefits from a number of regular bus services to Wincanton and Street, with a less frequent service to Yeovil. Bruton also benefits from a railway station, which is on the South West Trains line running from Bristol to Weymouth.

There is only limited on street parking owing to the narrow streets in the centre. There are a number of car parks located in close proximity to the centre:

- Higher Backway (10 spaces)
- Tolbury Mill (24 spaces)
- Packhorse Bridge (7 spaces)
- Dropping Lane (20 spaces)

- Bruton Station (18 spaces)

J. Martock Local Centre

Martock is designated by Policy EP9 of the Local Plan as a Local Centre. This is the fourth tier of settlement behind Yeovil, the Market Towns and District Centres. Martock is classed as a Rural Centre.

Mix of Uses and Retailer Occupation

Table J.1 Martock Breakdown of Uses

Type of Unit	Number of Units 2017	% of Total Number of Units	
		Martock %	UK Average %
A1 – Comparison	3	15.8	33.4
A1 – Convenience	4	21.1	10.4
A1 – Service	5	26.3	13
A2 – Service	1	5.3	11.8
A3	1	5.3	9.5
A5	3	15.8	6.0
A4 pubs/bars	0	0	4.6
Vacant	2	10.5	11.2
Total	**19**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017)

The centre (as defined by the adopted Local Plan) has a very limited range of comparison units, and the provision is significantly below the national average. Existing provision comprises two charity shops and a pet shop. In terms of convenience offer, there is a Spar Shop (136 sq. m net), a Co-op (216 sq. m net), a newsagent and a bakery. The provision of Class A1 service uses is significantly above the national average; however the provision of Class A2 service uses is below the national average. There are a number of hairdressers, a post office, an opticians and an estate agent. There is only one café in the centre and three takeaways.

The vacancy rate at 10.5% is slightly below the national average.

Nature and quality of the retail environment

The majority of the centre is within a Conservation Area and comprises a number of attractive, historic buildings. In most cases, the shopfronts are traditional and of good quality.

Accessibility and Parking

There is a limited bus service to Taunton and Yeovil.

There is some on street parking available, however this is limited. The Moorlands car park is free of charge and provides 75 spaces.

K. South Petherton Local Centre

South Petherton is designated by Policy EP9 of the Local Plan as a Local Centre. This is the fourth tier of settlement behind Yeovil, the Market Towns and District Centres. The Local Plan defines South Petherton as a large, attractive village.

Mix of Uses and Retailer Occupation

Table K.1 South Petherton Breakdown of Uses

Type of Unit	Number of Units 2017	% of Total Number of Units	
		South Petherton %	UK Average %
A1 – Comparison	11	39.3	33.4
A1 – Convenience	6	21.4	10.4
A1 – Service	4	14.3	13.0
A2 – Service	3	10.7	11.8
A3	2	7.1	9.5
A5	1	3.6	6.0
A4 pubs/bars	1	3.6	4.6
Vacant	0	0	11.2
Total	**28**	**100.0**	**100.0**

Source: SSDC Land Use Survey January 2017, VOA Data 2017, UK average for all town centres surveyed by Goad Plans (January 2017)

The centre (as defined by the adopted Local Plan) has a higher than average provision of comparison units, when compared with the national average. Notwithstanding this, the range is limited and includes a number of charity shops, electrical and hardware shops. In terms of convenience offer, there are a number of butchers, delicatessens and a Co-op (168 sq. m net). The provision of service uses is below the national average and includes hairdressers, estate agents, a post office and a bank. In terms of food and drink uses, there is a café, a restaurant, a public house and a takeaway.

There are no vacancies within the centre, which suggests the centre is healthy.

Nature and quality of the retail environment

The centre is within a Conservation Area and comprises a number of high quality, attractive historic buildings and public realm. The commercial units are historic and in the most part and comprise traditional shopfronts.

Accessibility and Parking

The centre benefits from an hourly bus service to Yeovil.

There is only limited on street parking owing to the narrow streets in the centre. Prigg Lane car park is free of charge and provides 25 spaces.

L. Ilchester District Centre Local Centre

Ilchester is designated by Policy EP9 of the Local Plan as a Local Centre. This is the fourth and lowest tier of the retail settlement hierarchy. The settlement benefits from a Royal Naval Air Station which practically doubles the population of Ilchester to around 4,500. The Local Plan states that alongside the strong employment function it provides a retail and community service role.

Mix of Uses and Retailer Occupation

There are only six commercial units within Ilchester centre (as defined by the adopted Local Plan). This comprises a post office, hairdresser, restaurant, two public houses and a Chinese takeaway.

There is no convenience or comparison shops in the centre although the Texaco Garage does incorporate an important ancillary retail use (Central Off Licence). The nearest food stores are located in Yeovil.

There is no bank, estate agent or travel agent within Ilchester.

There are no vacant units within Ilchester.

Nature and quality of the retail environment

The commercial units are interspersed with residential uses and other non-domestic uses. The town centre is located within the Ilchester Conservation Area. There are also a number of listed buildings within the centre. These historic assets create a high quality public realm with most buildings constructed of stone or other traditional materials.

Accessibility and Parking

The settlement has two car parks located at Limington Road (25 spaces) and Market Place (12 spaces). A bus stop is located at Lyster Close which provides 2 services per hour to Yeovil. The journey takes approximately 20 minutes.

M. Milborne Port Local Centre

Milborne Port is designated by Policy EP9 of the Local Plan as a Local Centre. This is the fourth and lowest tier of the retail settlement hierarchy. The Local Plan states that Milborne Port has self-containment issues with 71% of the economically active residents travelling out of the village for work.

Mix of Uses and Retailer Occupation

Milborne Port centre (as defined by the adopted Local Plan) comprises six commercial units; which are: a newsagent, butchers, post office, two public houses (Kings Head and The Tippling Philosopher) and a fish and chips shop. Whilst not a commercial use the centre also incorporates a library. The number of commercial units is low but the services provided are vital to the residents of Milborne Port. There is one vacant unit which is the former Queens Head public house.

The centre lacks some key facilities such as a convenience store and a bank.

The nearest food store is located in Sherborne which is located in the District of West Dorset approximately 3 miles away.

Nature and quality of the retail environment

The commercial units are interspersed with residential uses and other non-domestic uses. The town centre is located within the Milborne Port Conservation Area. There are also a number of listed buildings within the centre. These historic assets create a high quality public realm with most buildings constructed of stone or other traditional materials.

Accessibility and Parking

A bus stop is located on North Street which provides services to Kingsbury Regis. There is only one car park within Milborne Port which is located at Town Hall. This provides 10 parking spaces.

N. Stoke-Sub-Hamdon Local Centre

Stoke-sub-Hamdon is designated by Policy EP9 of the Local Plan as a Local Centre. This is the fourth and lowest tier of the retail settlement hierarchy. The Local Plan states that the historic core of the village, dating from the 14th Century, is centred on the High Street and is characterised by tight development fronting onto the street.

Mix of Uses and Retailer Occupation

Stoke-Sub-Hamdon is a large village which comprises eight commercial units. There are two charity shops, a small supermarket (Mace), a carpet shop, a hairdresser, a beauty parlour and two public houses within the centre (as defined by the adopted Local Plan). There is one vacant unit.

The centre lacks key services such as a bank, restaurants and a food store. The nearest food stores are located in Ilminster (Tesco) and Yeovil (Asda). Ilminster is approximately 8 miles away whilst the Asda in Yeovil is approximately 6 miles away.

Nature and Quality of the Retail Environment

The commercial units are interspersed with residential uses and other non-domestic uses. The town centre is located within the West Stoke Conservation Area. There are also three listed buildings within the centre. One of these is the Fleur De Lis Hotel. These historic assets create a high quality public realm with most buildings constructed of stone or other traditional materials.

Accessibility and Parking

A bus stop is located on High Street which provides an hourly service to Yeovil. There is one public car park within Stoke-Sub-Hamdon. This is located off Ham Hill Road and provides 20 spaces. There is only very limited on street parking owing to the narrow form of the High Street.

O. Babylon Hill (Peel Centre) – Out of Centre Retail Park (No policy status)

The Peel Centre is located in West Dorset District Council but it is in close proximity to Yeovil's town centre. Therefore South Somerset District Council cannot control development at the park which could impact upon Yeovil's town centre. Recently a number of shops have closed in Yeovil's town centre and relocated to Babylon Hill.

According to the Peel Centre's website the Peel Centre now comprises a total of 10,467 sq m (112,668 sq ft) Gross Internal Area (GIA) of A1 (non-food) retail floorspace. There are 532 car parking spaces. According to the company's website there is an annual comparison goods market expenditure of £672m with the average shopper spending £40.34. The park has an average dwell time of 35 minutes and a repeat visit of 26 times a year.

It is long recognised that Yeovil Town Centre and Babylon Hill compete with each other for retail units. Next and JJB Sports/Sports Direct evidence this – both shops closed down in Yeovil Town Centre and relocated to Babylon Hill. They are national multiple comparison retailers that one would normally expect to find in the Town Centre and not in an out-of-centre retail park. This highlights the fragile competitive position of the town centre compared with out-of-centre shopping locations.

The Peel Centre is clearly divorced from Yeovil town centre and therefore the potential for linked trips is minimal.

Currently the Peel Centre comprises a number of national multiple retailers more normally associated with town centre locations, including Boots, Next (relocated from the town centre), TX Maxx, Argos and Sports Direct.

Appendix 6: Household Survey Results

Appendix 7: Household Survey Analysis

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 1,003 households across the South Somerset study area in February 2017. The study area was split into nine zones, based on ward boundaries. In order to provide statistically reliable sub-samples a minimum of 100 completed interviews were undertaken in each zone. The main aims of the survey were to establish patterns for the following:

- main food and top up grocery shopping;
- non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items;
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts); and
- leisure activities.

Main Food Shopping

Respondents were asked where they last undertook their main food and grocery shopping.

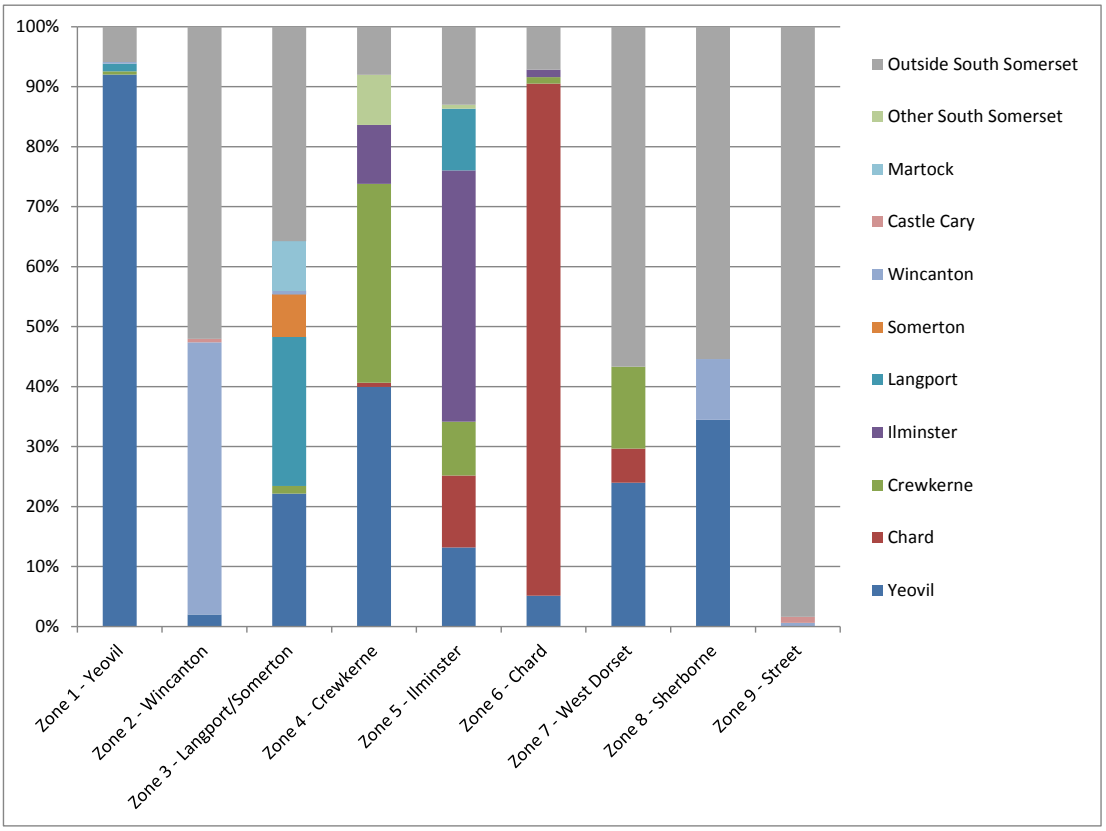
The Tesco Extra store in Yeovil was the most popular destination within South Somerset District, attracting 9.6% of main food shopping trips for the study area as a whole, closely followed by the Asda (9.5%) and Morrison's (5.6%) in Yeovil, and Tesco in Chard (5.3%). The internet was used by 3.5% of respondents. The market share of main food shopping (excluding internet shopping) for the main centres is shown in Figure A below.

The retention of main food shopping trips in the District is high (over 87%) in Zones 1 (Yeovil), Zone 4 (Crewkerne), Zone 5 (Ilminster) and Zone 6 (Chard). The retention rate is relatively high in all the core zones within the District i.e. Zones 1 to 6. In the outer zones (7 to 9) most main food shopping trips are attracted to stores in Bridport (Zone 7), Sherborne (Zone 8) and Street/Glastonbury (Zone 9).

Food stores in Yeovil, Wincanton, Langport, Crewkerne, Ilminster and Chard are key main food destinations within their respective zones, indicating that most households shop in their nearest town for main food shopping.

During their main food and grocery shopping 33% of respondents indicated that they link this shopping trip with other activities, and of these respondents, 34% undertook non-food shopping, 17% used other services (e.g. bank, post office, hairdresser etc.) and 17% for social or leisure activities. These results demonstrate the importance of the role of large food stores as anchors, attracting spin-off trade for other businesses.

Figure A Main Food Shopping



Source: NEMS Household Survey February 2017

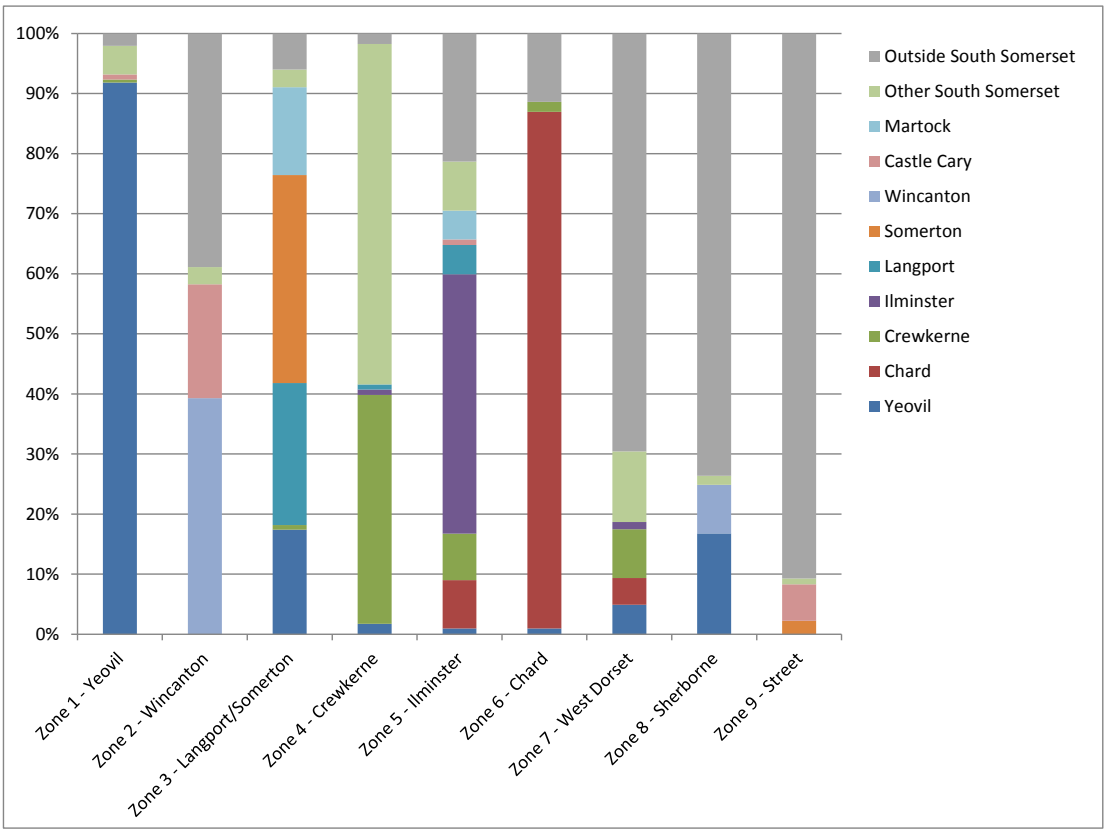
Top-Up Food Shopping

Around 69% of respondents undertake top-up food shopping trips made to supplement main food shopping trips. These top-up shopping trips are usually undertaken on a more frequent basis for perishable items such as bread and milk. The market share of top-up food shopping for each centre is shown in Figure B below.

A large number of stores/destinations were identified for top-up food shopping. Asda in Yeovil was the most popular destination within South Somerset attracting only 3% of respondents, closely followed by Morrison's (2.5%) and Tesco Extra (2.2%) in Yeovil. The patterns of top-up food shopping are more diverse than for main food shopping, with a wide range of stores/local shops each capturing a small overall market share. Yeovil, Wincanton, Langport, Crewkerne, Ilminster and Chard are key top-up food shopping destinations within their respective zones.

As with main food shopping, the retention rate is relatively high in all the core zones within the District i.e. Zones 1 to 6. In the outer zones most top-up food shopping trips are attracted to Bridport, Sherborne and Street/Glastonbury.

Figure B Top Up Food Shopping



Source: NEMS Household Survey February 2017

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Yeovil was the most popular destination with over 41% of all respondents doing most of the non-food shopping there, followed by the internet (10.9%), Taunton (10.5%) and Street (5.2%). Wincanton (1.9%), Chard (1.7%), Crewkerne (1.4%) and Ilminster (1.4%) were the most visited other destinations within the District.

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share (excluding internet shopping) for each non-food goods category within South Somerset District is shown in the graphs below and overleaf. Taunton has a strong influence on non-food shopping patterns across most of the District (apart from Wincanton – Zone 2). Exeter attracts trade from the Chard and Ilminster part of the District (Zone 5 and 6). Yeovil attracts a reasonable market across all zones for most categories of goods. Dorchester is a dominant destination in West Dorset (Zone 7). Sherborne is a dominant destination in Zone 8 (Sherborne Area) and Street has a high market share in Zone 9 (Glastonbury Area).

Figure C Clothing and Shoes

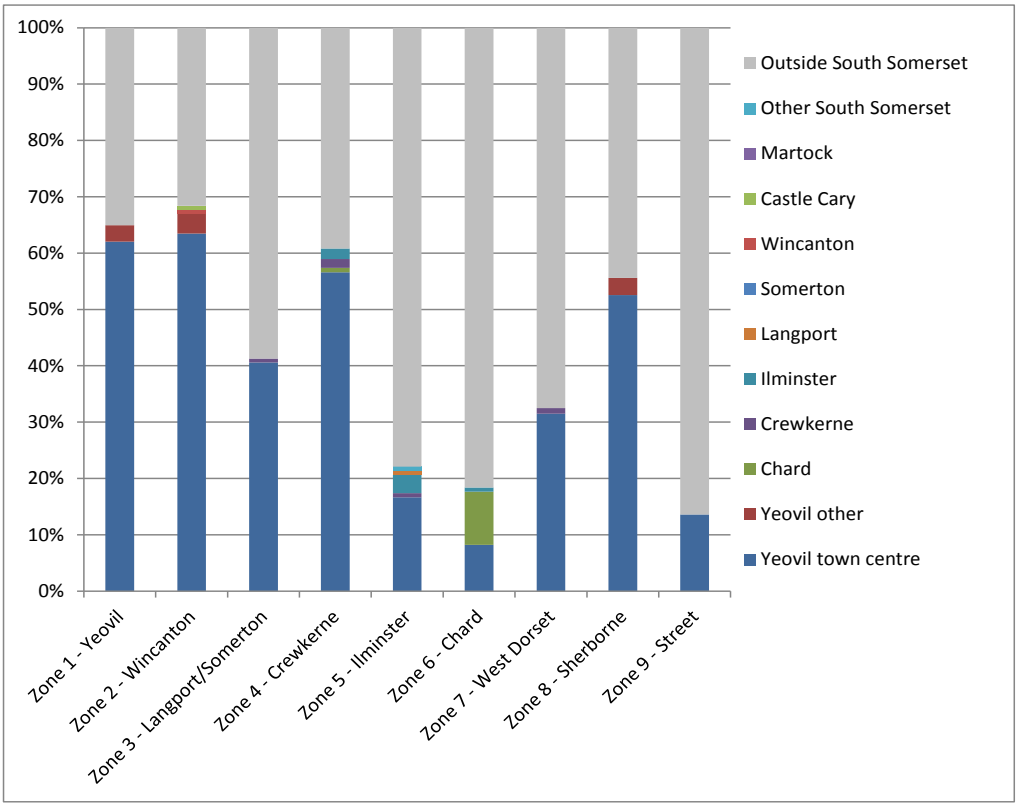
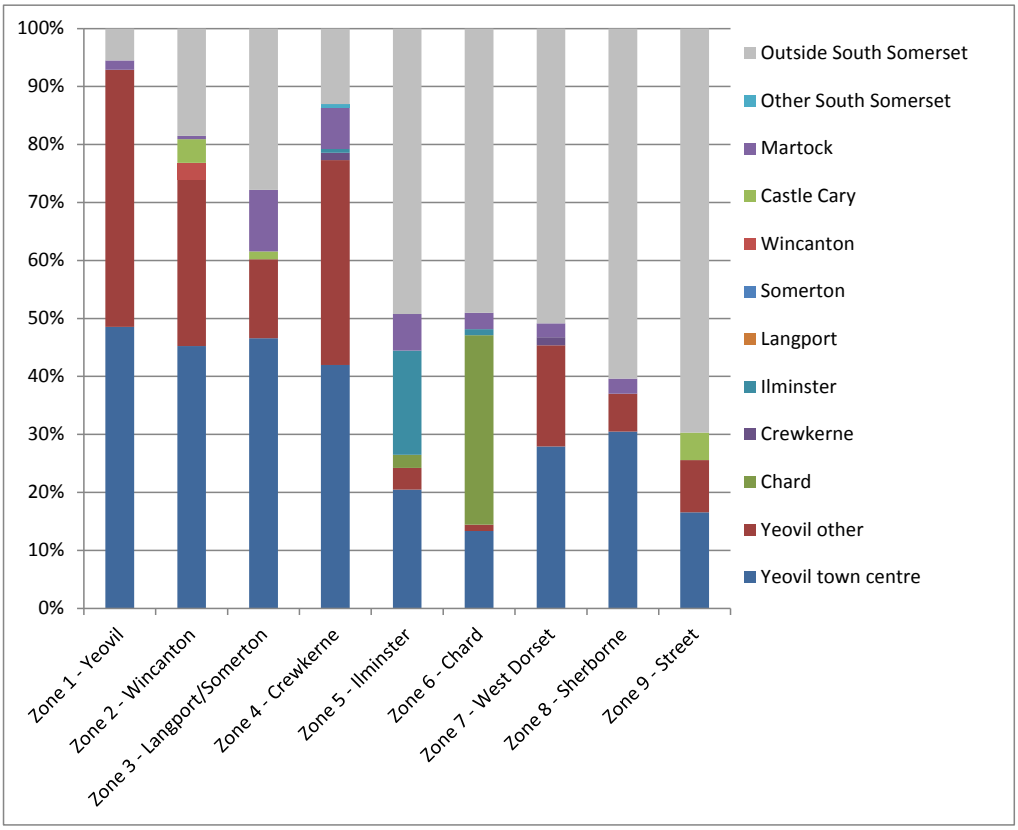


Figure D Domestic Electrical Appliances



Source: NEMS Household Survey February 2017

Figure E Other Electrical Goods

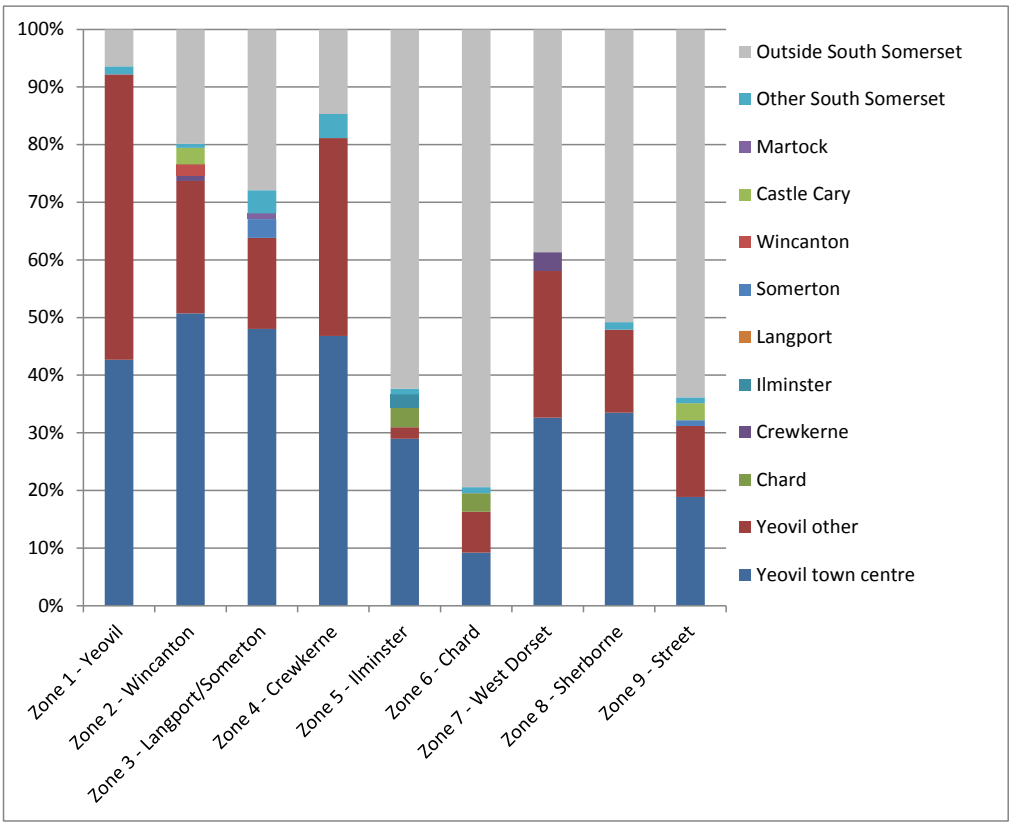
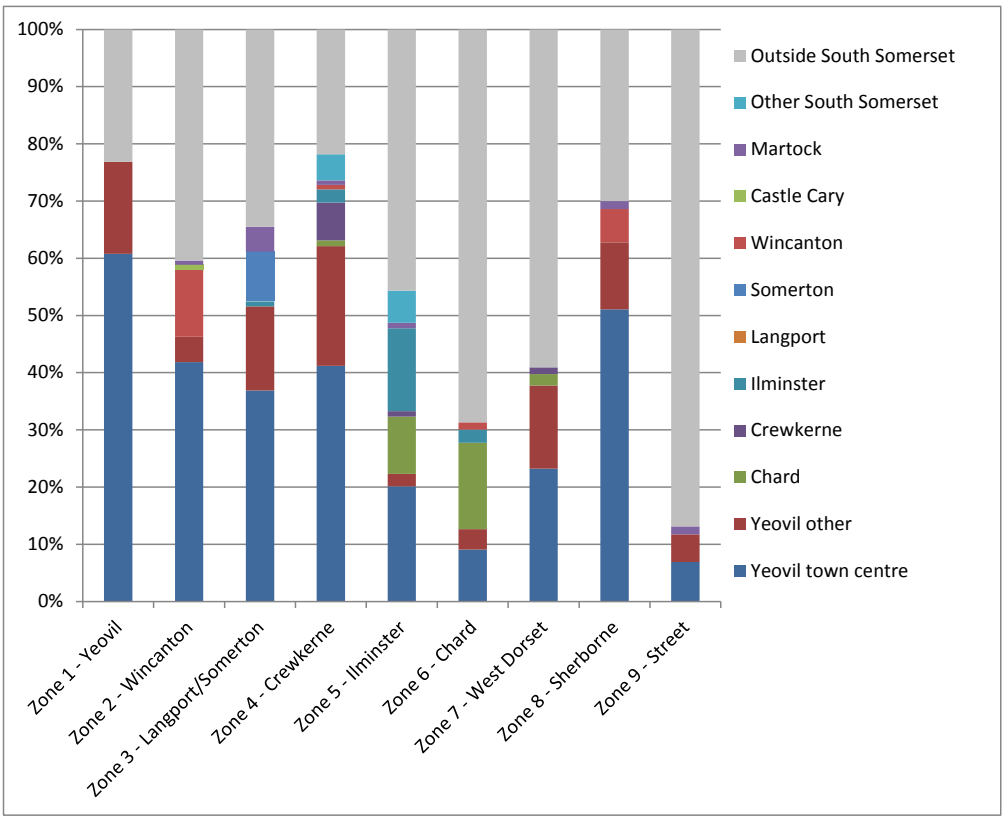


Figure F Furniture, Soft Furnishings and Floor Coverings



Source: NEMS Household Survey February 2017

Figure G DIY, Hardware and Garden Items

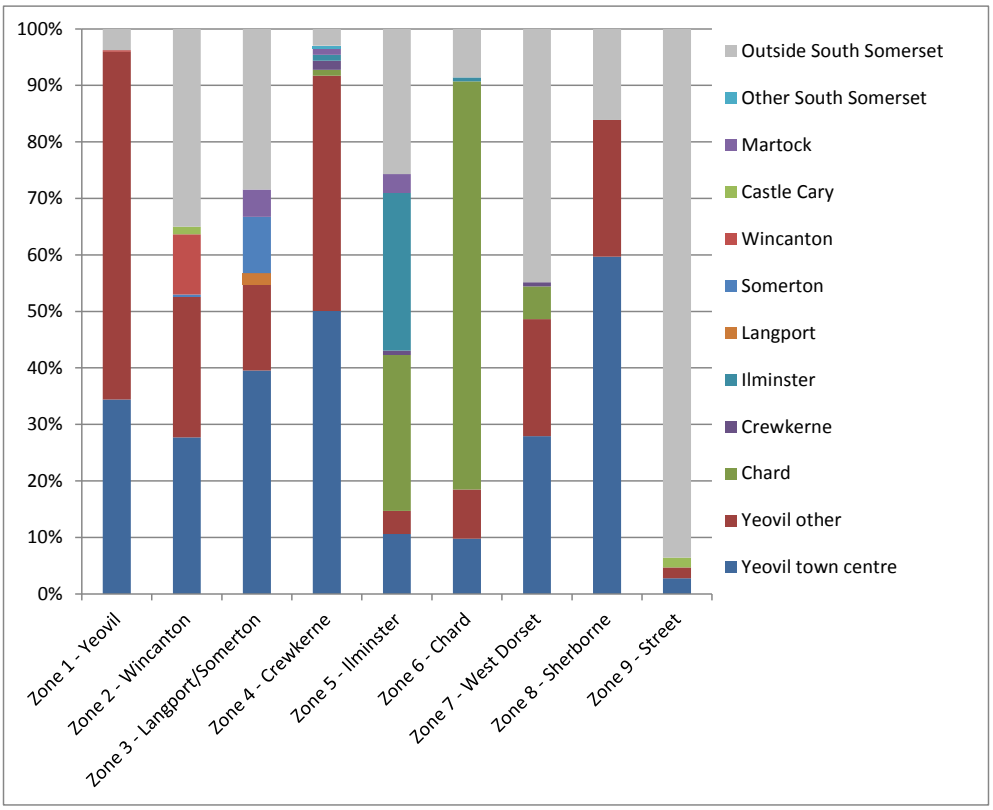
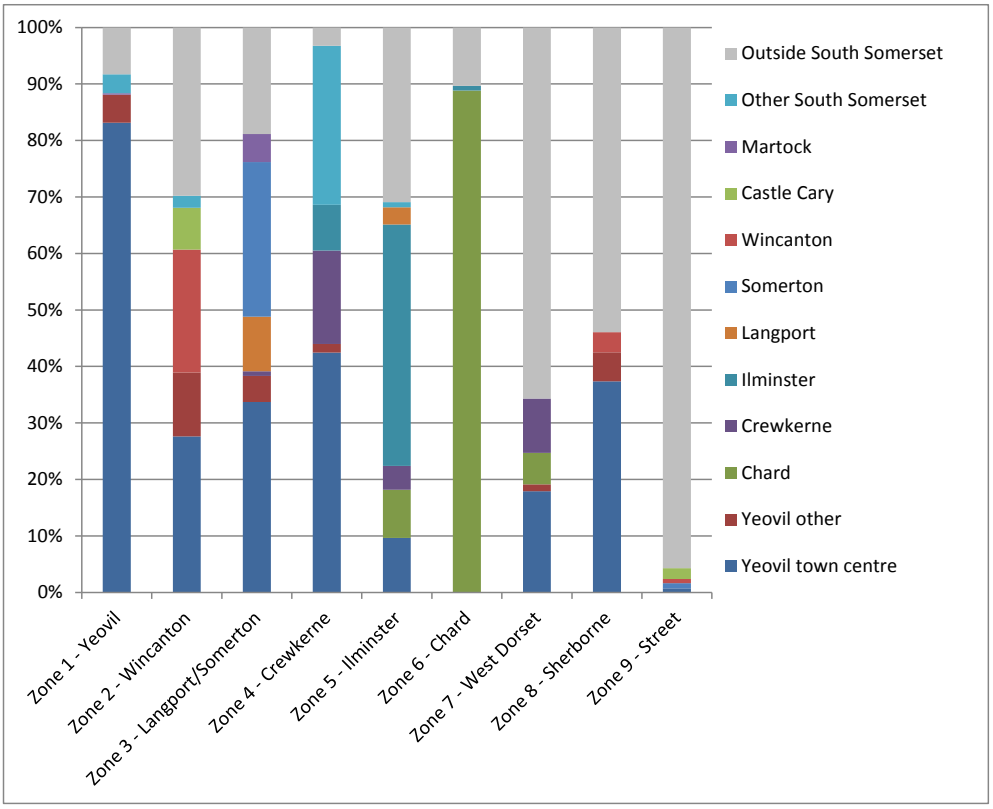
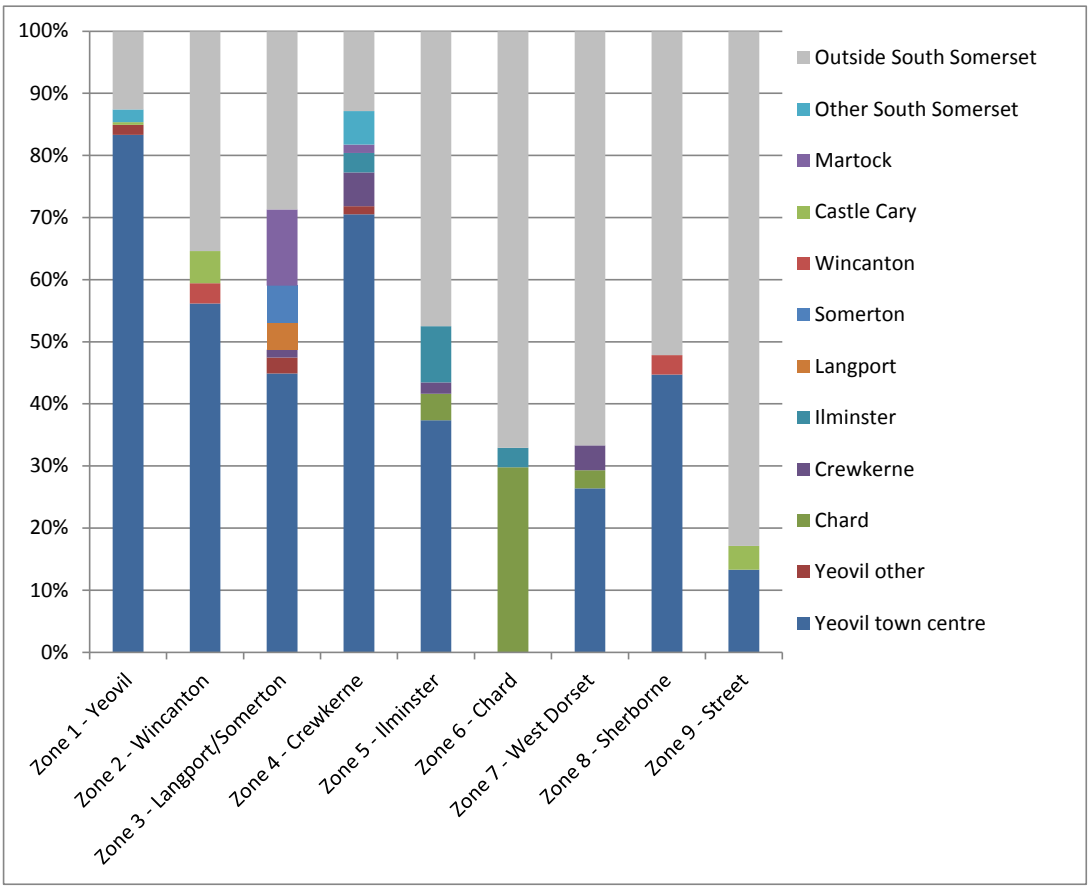


Figure H Health, Beauty and Chemist



Source: NEMS Household Survey February 2017

Figure I Books, CDs, Toys and Gifts



Source: NEMS Household Survey February 2017

Mode of Travel for Shopping

In the whole study area, over 91% of respondents indicated that they travel to do their main food shopping by car either as a driver or passenger. Based on Lichfields' experience, high car usage is common for a predominantly rural district. A small proportion of respondents (4.5%) walk to their main food shopping destination and 1.6% travel by bus.

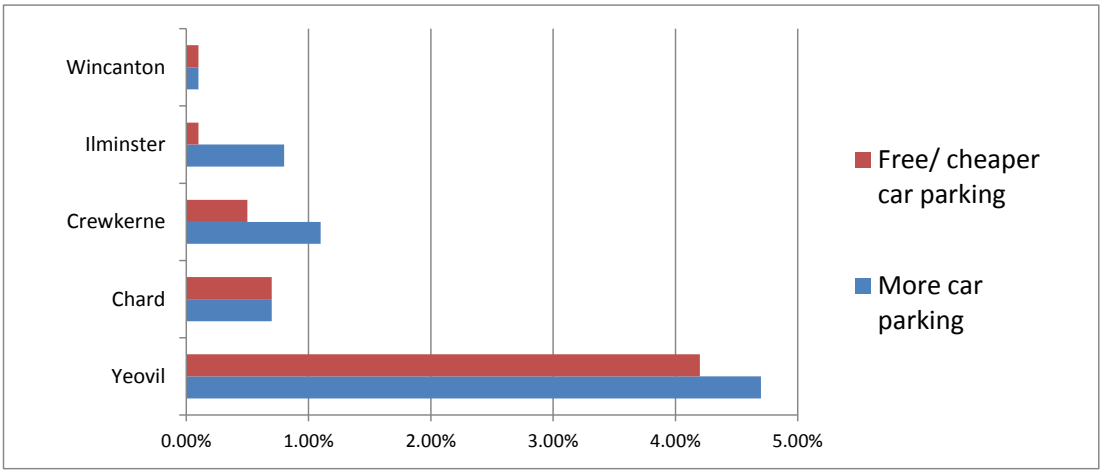
Car usage is slightly lower for non-food shopping with 88% of respondents indicating they travel by car. More respondents travel by bus (2.9%) or walk (4.9%) for non-food shopping when compared to main food shopping.

Shoppers' Views

The household survey asked respondents what would make them visit the five main centres more often (i.e. Yeovil, Chard, Crewkerne, Ilminster, and Wincanton). In relation to Yeovil around 47% indicated that "nothing" would make them shop more often within the town. A much higher proportion (over 85%) of respondents indicated that "nothing" would make them shop more often within the four smaller towns. These respondents were predominantly in 'non-local' zones, therefore unsurprisingly demonstrating that distance directly corresponds with the likelihood of a visit. As a result, the proportion of respondents mentioning each suggested improvement is relatively low i.e. less than 5% of all respondents within the study area. Most responses related to

the amount and cost of car parking, the choice of clothing shops, the choice of shops in general and the quality of shops. The results for these main responses are shown in Figures J and K below.

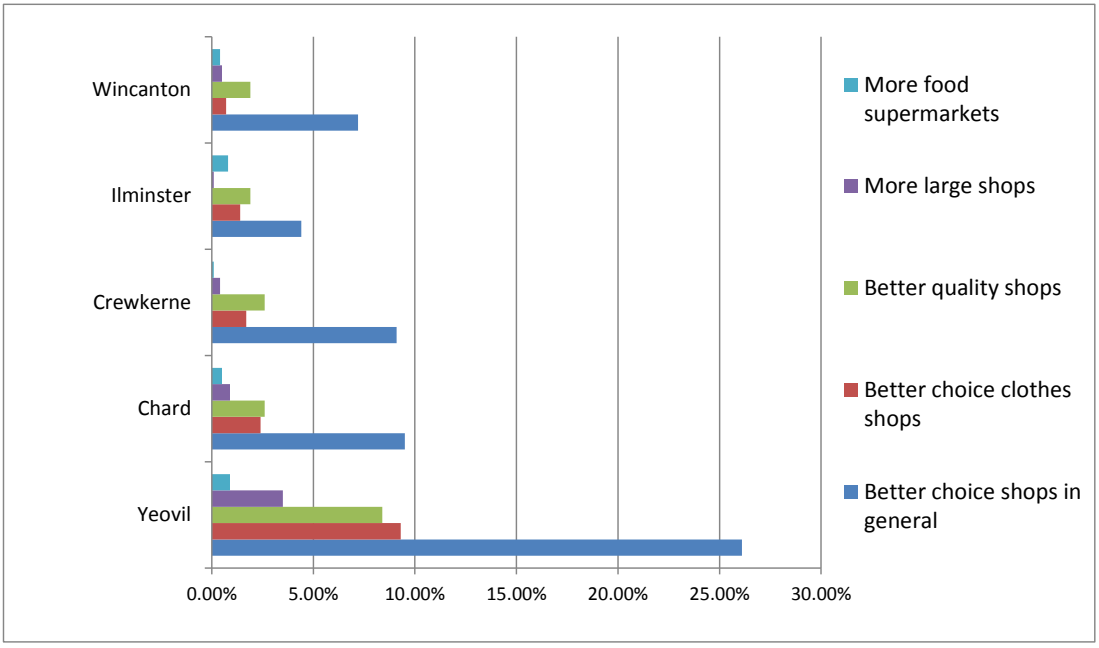
Figure J Car Parking Related Issues Mentioned by Respondents for Each Town



Source: NEMS Household Survey February 2017

The amount or cost of car parking does not appear to be a significant issue particularly in the smaller towns. A higher proportion mentioned car parking issues in Yeovil but the overall percentage is relatively low (less than 5%).

Figure K Shopping Related Issues Mentioned by Respondents for Each Town



The responses received appear to suggest that improvements to shopping provision are related to the size of centre. Yeovil is by far the largest centre but recorded the highest number of respondents mentioning potential improvements. These results suggest that perhaps respondent's expectations

are lower in smaller centres and/or improvements within smaller centres are less likely to make people shop more often in that town.

Other responses recorded by at least 10 respondents for each town are summarised below:

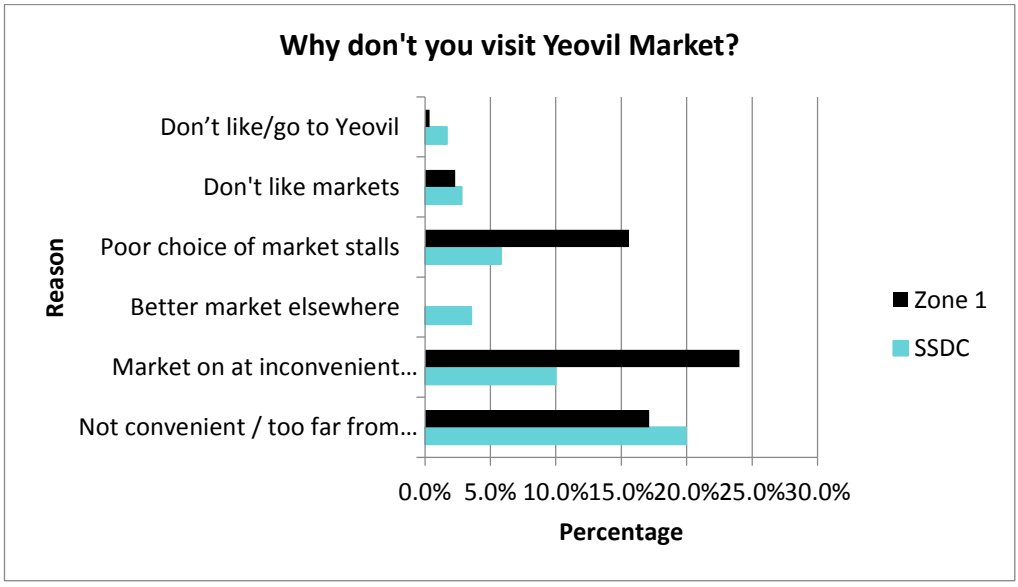
- **Yeovil**: in addition to the results shown in Figures J and K, 3.8% mentioned better accessibility, 2.9% less congestion/too busy, 2.4% more pedestrianised areas, 1.7% better maintenance / cleanliness, 1.7% a more attractive environment and 1.4% mentioned improved bus services.
- **Crewkerne**: 1.7% of less congestion/too busy.

Yeovil Market

As part of the market research undertaken by NEMS, respondents were asked if they visit Yeovil Market. 81.6% of respondents stated that they never visited Yeovil Market with only 1.8% saying that they visited every week.

Respondents who never visit were asked why they didn't visit Yeovil Market. 40.5% said that they didn't know or that there wasn't a particular reason and 11.4% said that they were unaware of the market. The other responses were as follows:

Figure L Why don't you visit Yeovil Market?



Source: NEMS Market Research

It appears that Yeovil Market is not a big draw within the local area. As the percentage of people who are unaware of the market is quite high it may be worth better promoting the market as a means of attracting more customers.

Leisure Activities

The household survey asked respondents what leisure activities their family participate in as shown in Figure M. The destinations for the four main activities are shown in Figures N to Q.

Figure M Leisure Participation Rates within the Study Area

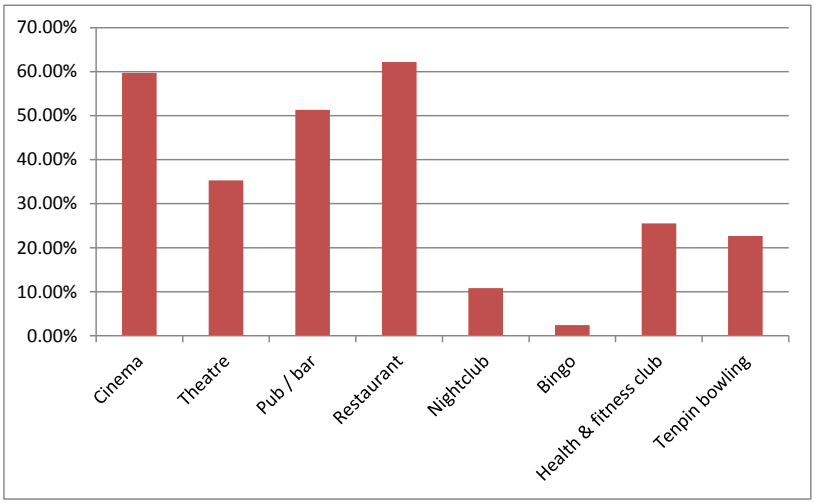


Figure N Cinema Destinations

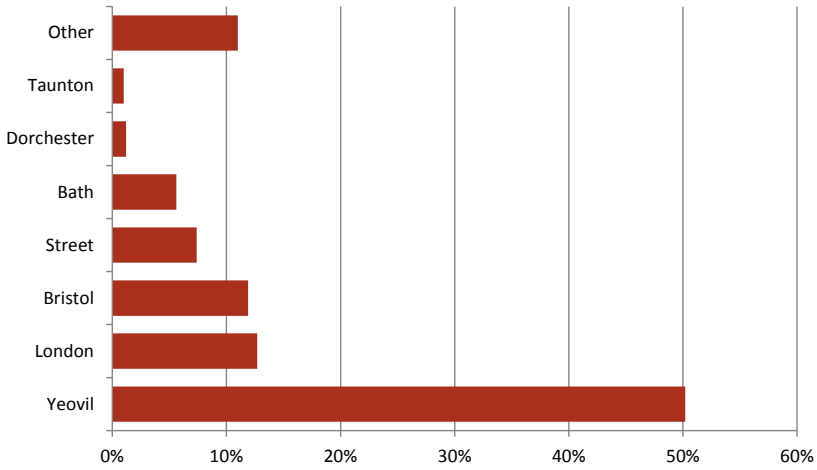


Figure O Theatre Destinations

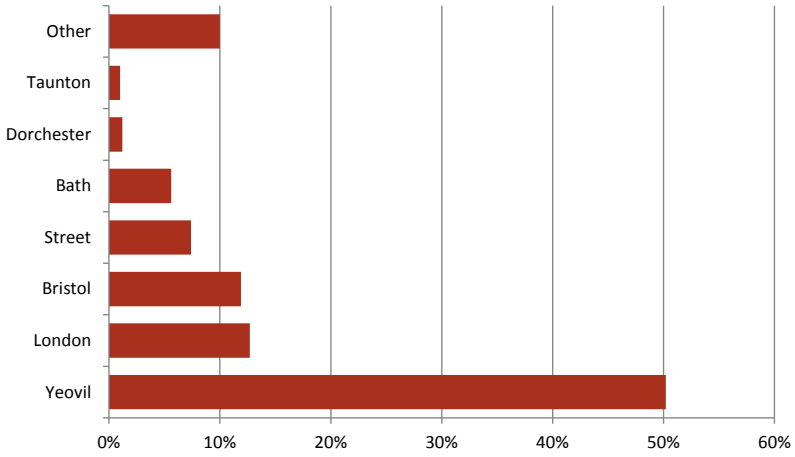


Figure P Pub/Bar Destinations

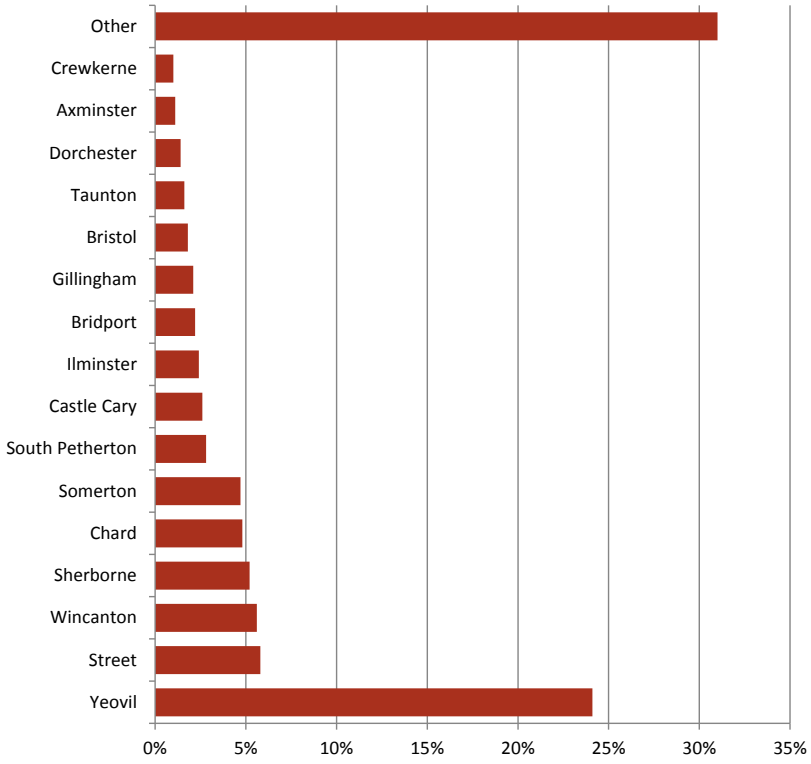
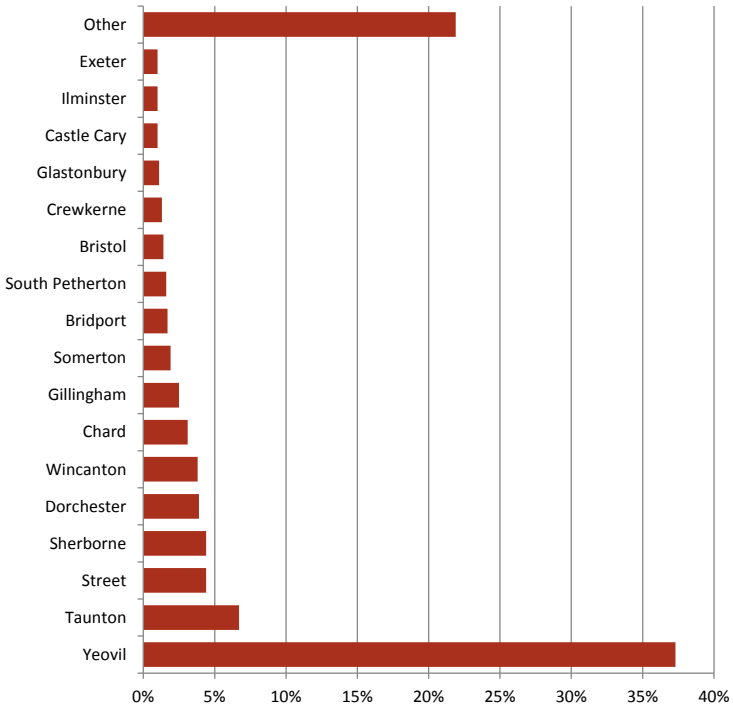
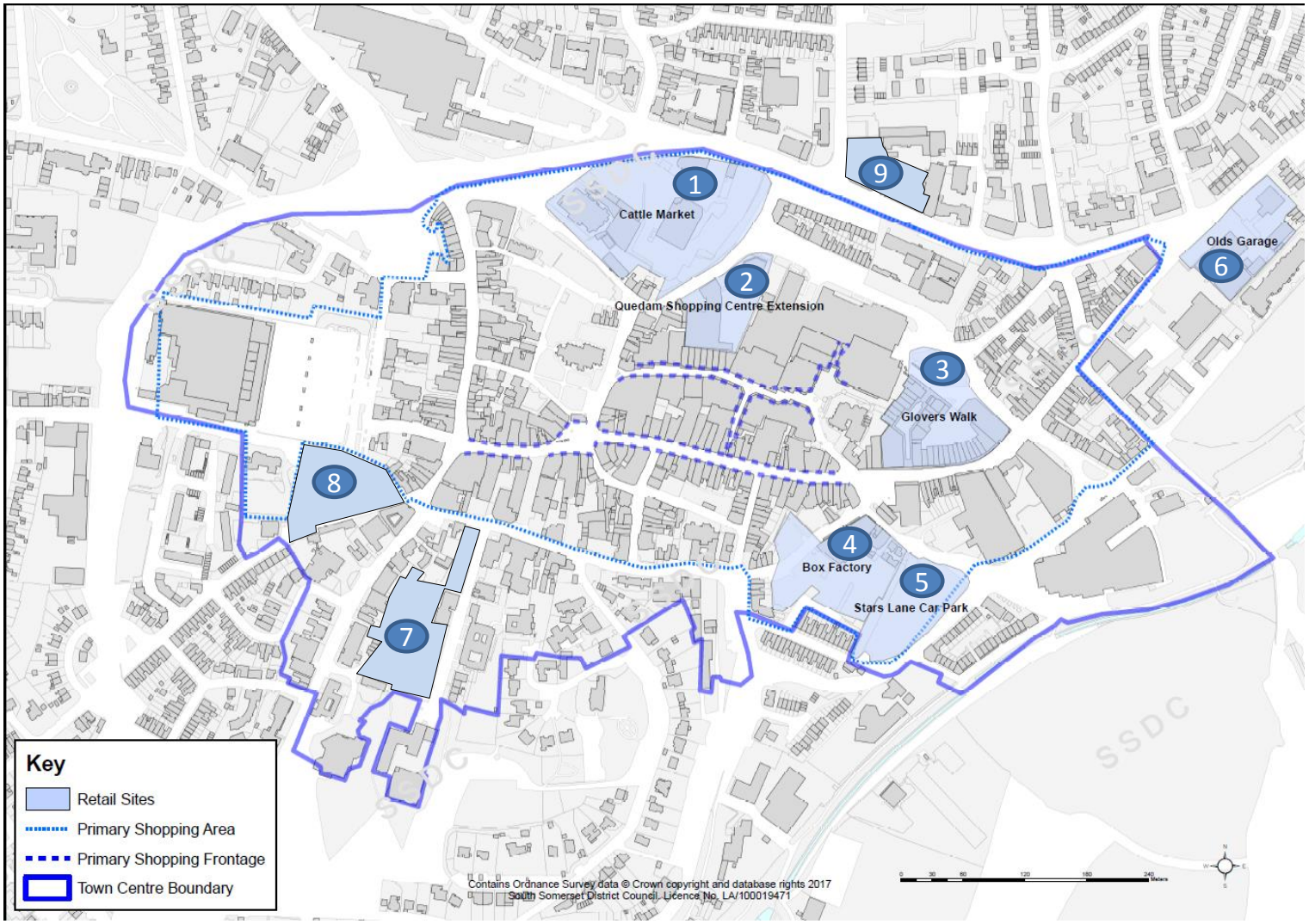


Figure Q Restaurant Destinations



Appendix 8: Development Opportunities

Yeovil Development Opportunities

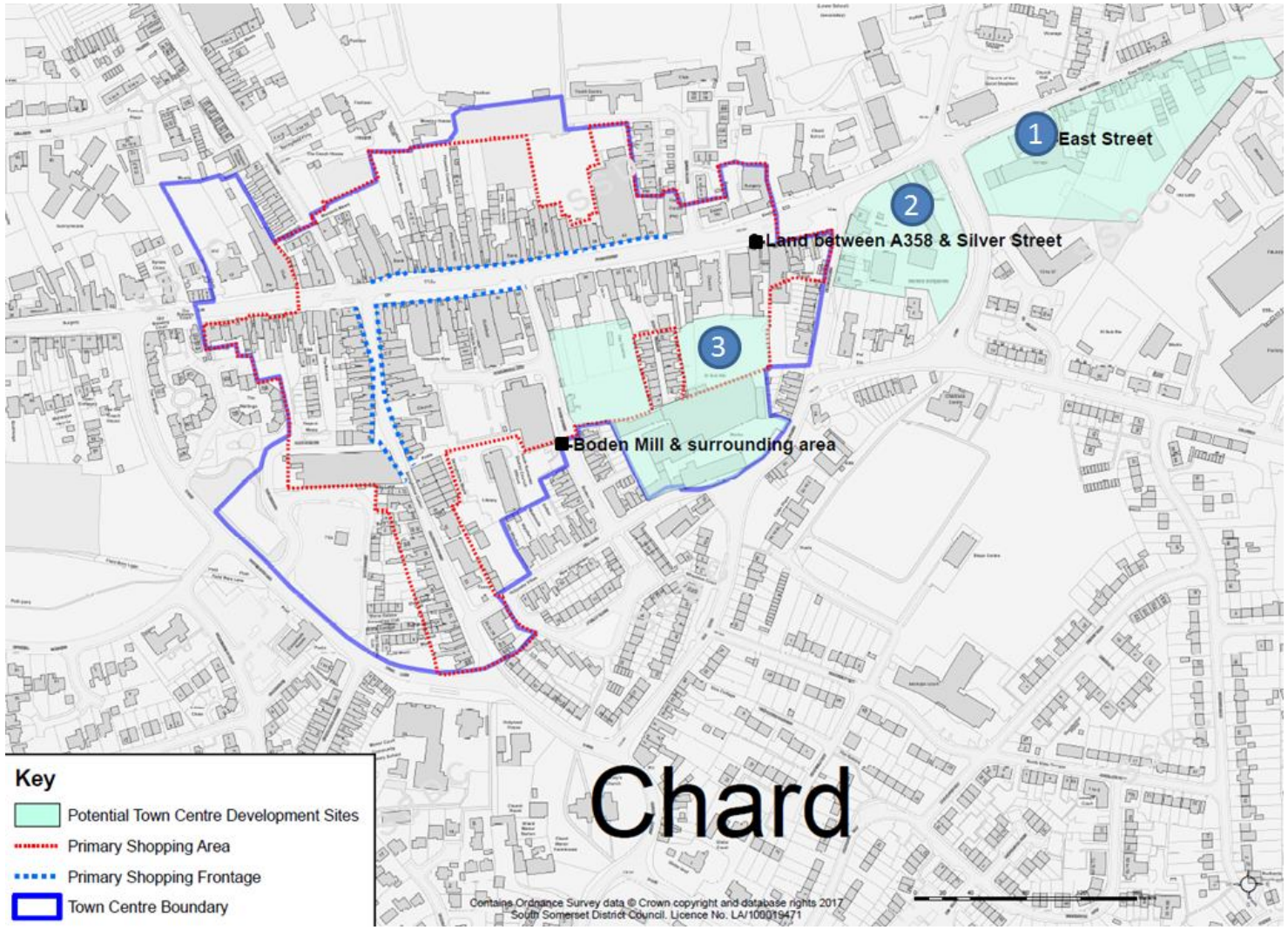


Site	Current Use	Policy Designation	Potential Uses	Availability	Scale	Viability Considerations	Overall Potential
1. Cattle Market 3.7 acres / 1.5 hectares	Public car park (29 spaces). Hand car wash, vacant buildings and hardstanding areas.	Town Centre Primary Shopping Area	1. High density mixed use development with retail/leisure fronting onto Market Street including element of residential, office or hotel development on upper floors. 2. Lower density development with large format retail/leisure (circa 5,000 sq. m). This could include a medium sized food store/discount store.	Available for development in the short term. Landowner has sought redevelopment in the past.	High density development with approx. 10,000 sq. m gross at ground floor level. Or lower density development of up to 5,000 sq. m could be accommodated.	Under-utilised site that is well connected to the town centre and forms a natural area for expanded town centre uses. Potential to link with development to the north of the Quedam Centre. Potentially available for development in the short term. High quality design will be required to overcome previous concerns relating to development of this site. Sloping site/levels and possible contamination. Potential need for land assembly. Highway access improvements required. Loss of 29 public car parking spaces that have high usage, but site is large enough to include new on-site parking. Previous schemes have failed to come forward.	Good
2. Quedam Extension 0.56 ha	Service yard within garage retail uses.	Town Centre Primary Shopping Area	Extension to Quedam Shopping Centre potentially linked to the Cattle Market site. To provide comparison goods retail, food/beverage (A3-A5) and leisure uses. Office or residential uses on upper floors.	Available for development in the short to medium term. Application for development including this area in the past.	Net increase in ground floor commercial floorspace up to 2,000 sq. m at ground floor level.	Relatively low density of uses currently on the site and provides an opportunity to extend to the rear of the Quedam Centre. Land assembly - trading businesses on site. Acquisition costs v net increase is space. Development linked to Cattle Market site.	Good

Site	Current Use	Policy Designation	Potential Uses	Availability	Scale	Viability Considerations	Overall Potential
3. Glovers Walk 2.3 acres / 0.93 hectares	Shopping centre and bus station	Town Centre Primary Shopping Area	Reconfiguration to provide larger/modern retail units but overall floorspace will not increase significantly unless the bus station is relocated. Opportunity to introduce residential/office uses on upper floors. Opportunity to boost food/ beverage provision.	Uncertain due to presence of operational bus station and occupied retail units.	Maximum increase in floorspace of approx. 1,000 sq. m.	Any redevelopment needs to include bus station or provision for replacement bus station / new bus arrangement. No significant environmental impacts envisaged. Land assembly - retailers trading with varying length of leases. Scheme will likely need to be driven by SSDC. Modest level changes. Highway access/impact	Reasonable
4. Box Factory 1.31 acres / 0.53 hectares	Public car park (155 spaces) Night club and retail units on northern frontage	Town Centre Primary Shopping Area	1. Mixed use development (including residential/office/hotel use) with retail frontage onto Stars Lane. 2. Small/medium format retailers (if buildings are demolished) 3. Discount retailer	Frontage building in private ownership. Availability uncertain given businesses on site.	Small/Medium format retail/leisure of up to 2,000 sq. m gross if existing buildings are demolished.	Site has poor visual appearance and would benefit from redevelopment. Level changes and irregular shaped site Land assembly and existing businesses on site. Loss of public car parking, although under-utilised. Potential contamination and site may require piled foundations. Highway improvements may be required.	Reasonable
5. Stars Lane car park 1.55 acres / 0.63 ha	Public car park. (202 spaces)	Town Centre Primary Shopping Area	1. Mixed use development (including residential/office uses) with retail frontage. 2. Medium scale format retail/leisure	Council owned as car park could be brought forward for development in the short term.	Medium scale development with 2,000 sq. m gross at ground floor level.	Level change from west to east. Car park is well utilised in town centre and brings in valuable revenue for Council. Potential contamination.	Poor Due to loss of car parking

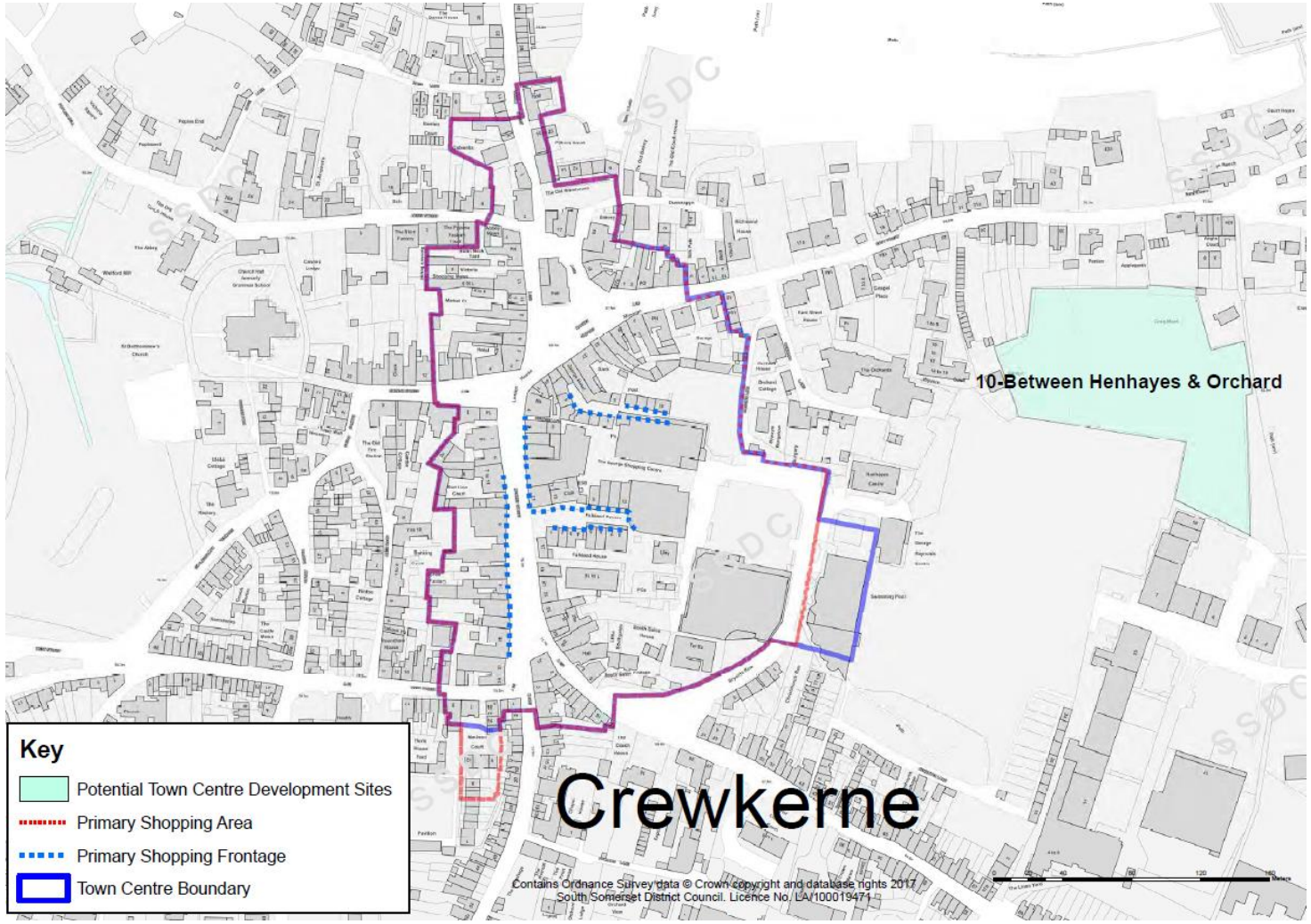
Site	Current Use	Policy Designation	Potential Uses	Availability	Scale	Viability Considerations	Overall Potential
6. Olds Garage 0.67 ha	Car dealership and vacant buildings	Edge of centre	1. Mixed use development with retail/food and beverage uses at ground floor with residential/office/hotel on upper floors. 2. Small/medium scale retail store.	Potentially available in the short term.	Up to 2,500 sq. m gross.	Under-utilised site. Existing car dealership will need to be relocated and buildings demolished. Edge of centre location and sequentially inferior to other potential development sites within the primary shopping area. The site is thought to be under offer to a discount food operator.	Good
7. Petters Way car park 0.57 ha	Public car park. (213 spaces)	Town Centre but outside the primary shopping area	Small/medium scale retail unit	Council owned car park could be brought forward for development in the short term.	Up to 2,000 sq. m gross.	Relatively peripheral from the primary shopping area, so not the preferred location for retail development. Close to Conservation Area. Car park is 7th most utilised in the town centre. Replacement multi-level car parking may be required which will increase costs.	Poor Due to loss of car parking
8. West Hensford car park 0.38 ha	Public car park (169 spaces)	Town Centre	Small scale retail units as part of mixed use development.	Council owned car park could be brought forward for development in the short term.	Up to 1,500 sq. m gross.	Located adjacent to the primary shopping area within close proximity to the Tesco store, but potentially difficult to connect development with the town centre. Relatively under-utilised car park (11th most utilised in town centre).	Poor
9. Bus Depot 0.32 ha	Bus depot but currently for sale	Outside Town Centre Boundary	Mixed use development including small retail, food and beverage uses with residential/office/hotel on upper floors.	Available - Currently for sale	Small scale retail (less than 1,000 sq. m gross)	Vacant property that is likely to provide a redevelopment opportunity which will require demolition works. Good main road frontage	Reasonable

Chard Development Opportunities



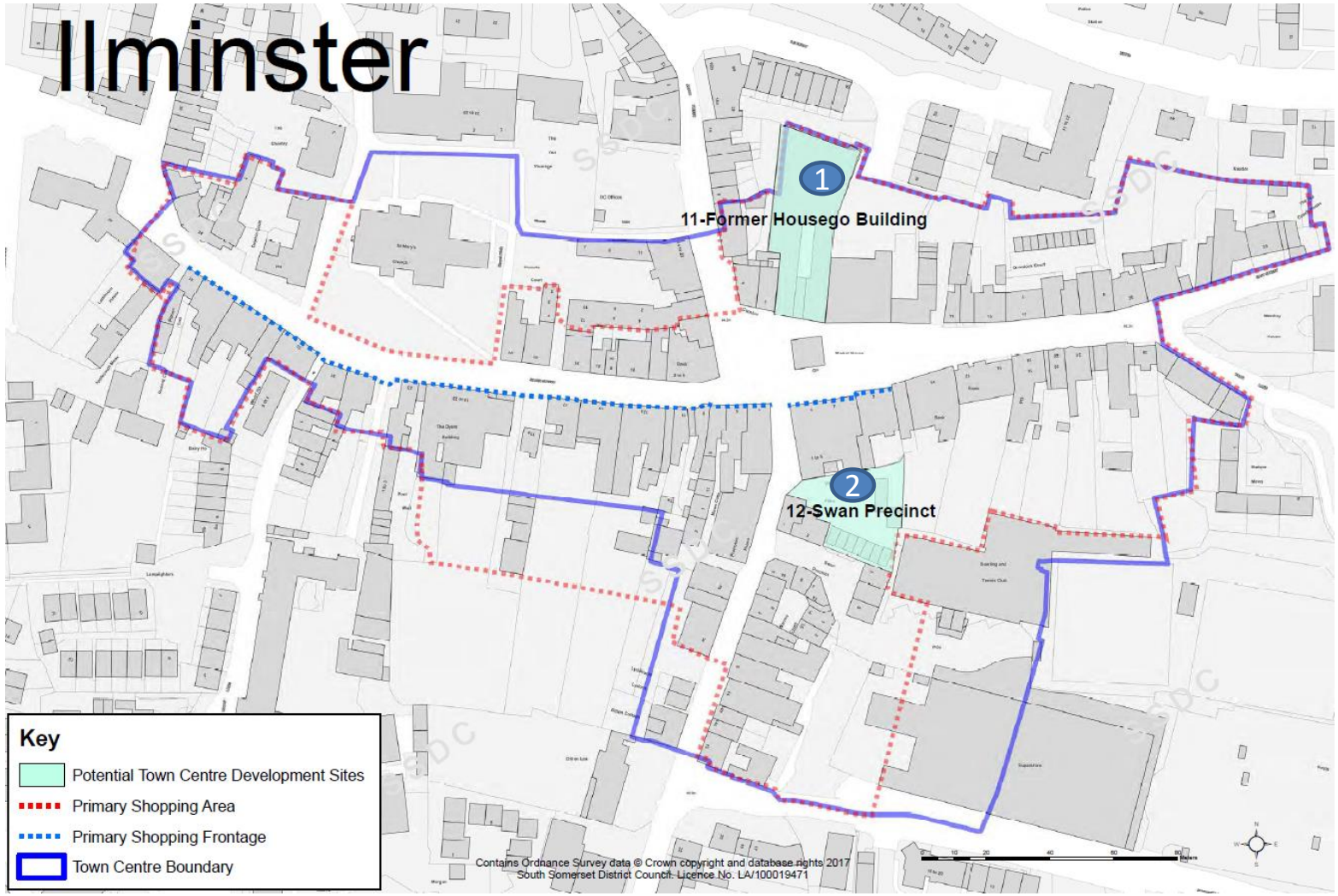
Site	Current Use	Policy Designation	Potential Use	Availability	Scale	Viability Considerations	Overall Potential
1. East Street 1.5 ha	Multiple uses i.e. retail unit, public house vacant former wool store building, residential dwellings, public house, petrol filling station, car dealership and sheds/storage.	1. East End (Chard) Strategic Growth Area 2. Area of High Archaeological Potential (part of site) 3. Edge of centre	Residential led, mixed use redevelopment. Part of site has planning permission for 14 apartments. Part of site is being promoted for 40 residential dwellings.	Uncertain – part of site for sale and appears to be under offer. Multiple ownerships on site likely.	East Street retail frontage could be extended on the west part of the site if the garage/petrol station became available. Small to medium scale (1,000 to 2,000 sq. m)	Under-utilised important gateway site on the edge of the town centre, sequentially inferior to other potential development sites within the primary shopping area. Part of site promoted for residential development and may be unavailable for town centre uses. Site assembly - businesses/residential dwellings on the site. Phased development may be appropriate.	Reasonable
2. Land between A358 and Silver Street 0.8 ha	Multiple uses i.e. Church, takeaway, car garage, residential dwellings and gym.	1. East End (Chard) Strategic Growth Area 2. Area of High Archaeological Potential 3. Edge of centre	Small scale retail units	Uncertain due to existing uses. Potential to redraw site boundary to exclude residential dwellings and Church.	Small scale retail (less than 1,000 sq. m gross)	Relatively under-utilised site adjacent to the town centre/primary shopping area, providing a natural extension to the town centre. Site assembly - businesses/residential dwellings.	Reasonable
3. Bowden Mill and Surrounding Area 1.13 ha	Two public car parks (Boden Street and Marketfields) and vacant buildings. Vacant buildings former factory and Lace Mill	1. Town Centre 2. Partially in Primary Shopping Area 3. Back Plots (Chard) Strategic Growth Area	Mixed use development – residential led, with ground floor retail units	Council owned car park could be brought forward for development the short term	Medium scale retail, food and beverage development (up to 2,000 sq. m)	Key development opportunity within the town centre that should be viable for retail and town centre uses. Lace Mill and archway are Grade II listed. Car park appears well utilised and replacement facilities may be required. Irregular shaped site will restrict scale/format of development.	Good

Crewkerne Development Opportunities



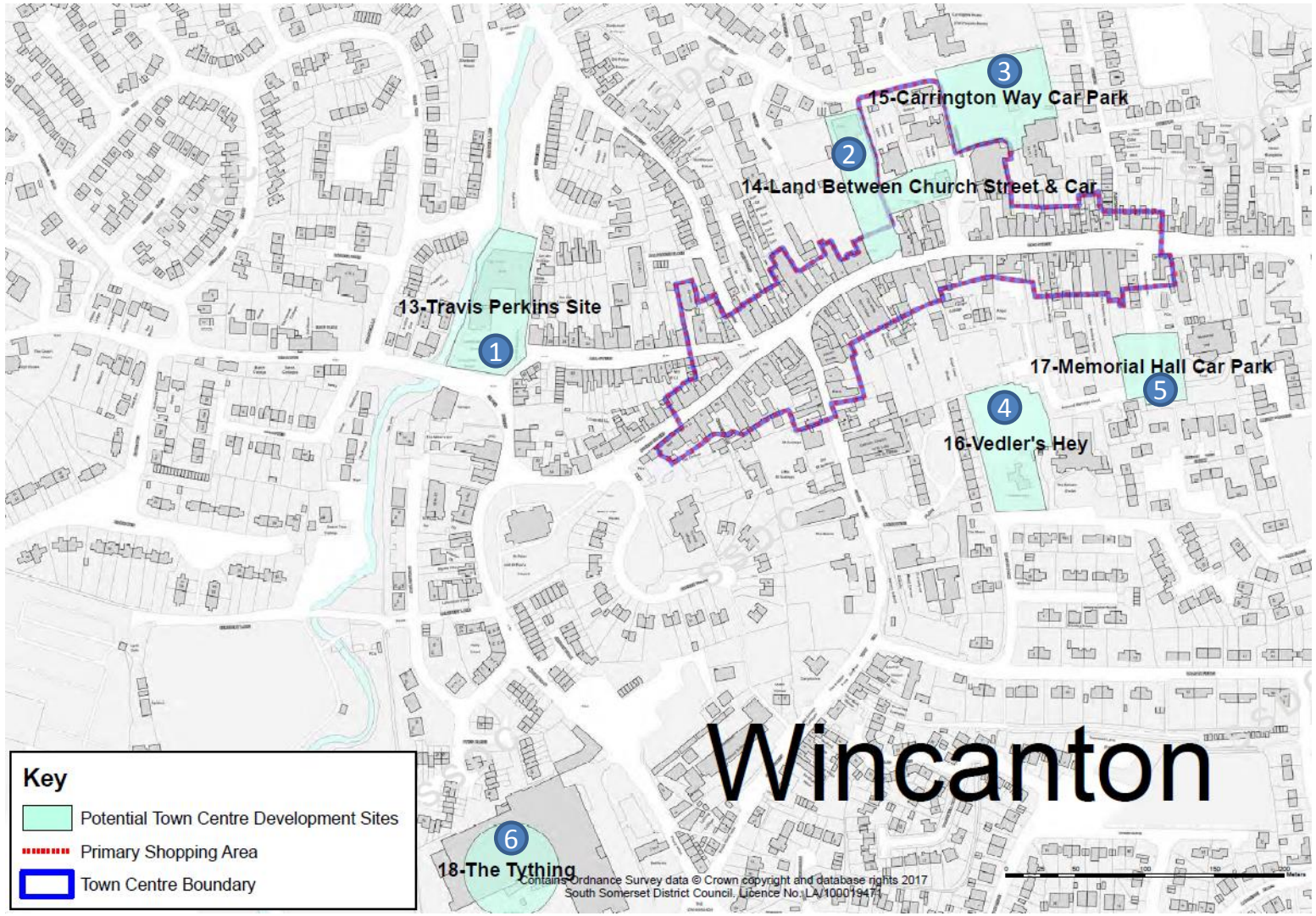
Site	Current Use	Policy Designation	Potential Use	Availability	Scale	Viability Considerations	Overall Potential
1. Between Henhayes and Orchard 1.2 ha	Greenfield land	Edge of centre	Large format retail uses. Alternatively a residential or employment site.	Undeveloped site that could be developed in the short term.	Large format retail/leisure of up to 5,000 sq. m gross could be accommodated.	Poor linkages to the town centre. Greenfield land with poor existing access. Lack of road frontage for retail uses.	Poor

Ilminster Development Opportunities



Site	Current Use	Policy Designation	Potential Use	Availability	Scale	Viability Considerations	Overall Potential
1. Former Housego Building 0.12 ha	Vacant period building.	Town Centre Primary Shopping Area	Reconfiguration and extension to provide leisure or retail space. Previous applications for 3 separate commercial units (13/01749/FUL)	Available – For Sale via Chesters Commercial	Small scale (less than 500 sq. m).	Grade II Listed Building. Conversion costs.	Reasonable
2. Swan Precinct 0.068 ha	Courtyard used as informal parking.	Town Centre Primary Shopping Area	Potential to provide a small number of retail units	Uncertain – appears to be in private ownership	Small scale (less than 200 sq. m gross).	Constrained site and lack of road frontage.	Poor

Wincanton Development Opportunities



Site	Current Use	Policy Designation	Potential Use	Availability	Scale	Viability Considerations	Overall Potential
1. Travis Perkins Site 0.4 ha	Trading builders merchant	Edge of centre	Mixed use development with small/medium scale retail at ground floor level. Residential or small office space above.	Uncertain given current use	Up to 1,500 sq. m gross.	Current viable existing use. Flood Zone 2/3	Reasonable
2. Land Between Church Street and Car Park 0.3 ha	Library and industrial unit.	1. Partially in Conservation Area (southern end of site) 2. Partially in Primary Shopping Area (southern and eastern parts)	Small scale retail unit fronting on High Street and Carrington Way.	Uncertain given business trading on site and library.	Small scale retail (less than 1,000 sq. m gross).	Existing uses on site may need to be relocated. Irregular shaped site with limited frontage.	Reasonable.
3. Carrington Way Car Park 0.4 ha	Public car park	Edge of centre	Mixed use development with small/medium scale retail at ground floor level. Residential or small office space above small scale retail unit.	Council owned car park could be brought forward for development in the short term.	Up to 1,500 sq. m gross.	Car park appears well utilised particularly by Co-op store customers.	Poor due loss of important car park.
4. Vedler's Hey 0.45 ha	Un-developed scrub land with some vacant buildings. 1. Overgrown grassed area 2. derelict building	Edge of centre	Residential led, mixed use development (a number of planning applications for residential development (up to 14 dwellings) have been refused) Small/medium scale retail element.	Private ownership. Potential for development in the short term.	1. If part of residential scheme, very small scale (less than 200 sq. m gross). 2. If retail led development, up to 1,500 sq. m gross.	Adjoins Conservation Area Poor road access and lack of main road frontage. Large tree (protected by a TPO) lies to the northern boundary Stone wall extends on the Angel Lane and Balsam Park boundaries Old brick walling extends on the rear boundary against the public car park.	Poor (for town centre uses).

Site	Current Use	Policy Designation	Potential Use	Availability	Scale	Viability Considerations	Overall Potential
5. Memorial Hall Car Park 0.22 ha	Public car park	Edge of centre	Mixed use development with small/medium scale retail at ground floor level. Residential or small office space above small scale retail unit.	Council owned car park.	Limited potential given road intersects through the middle of the car park. Small scale retail (less than 300 sq. m gross)	Constrained site - road intersects through middle of car park. Lack of road frontage. Adjoins Conservation Area Car park appears well utilised.	Poor
6. The Tything Approx. 3 ha	Industrial units and offices, gym and surface car parking.	1. Out of centre 2. Eastern part of site in Area of High Archaeological Potential	1. Mixed use development with ground floor retail units. 2. Large format retail/leisure unit	Uncertain given number of businesses trading from site	Large format retail/leisure over 6,000 sq. m could be accommodated.	Out of centre location – town centre development will be required to satisfy retail impact and sequential tests. Site acquisition/assembly. Demolition costs. Loss of employment land.	Poor

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