

Mid Devon Local Plan Review 2013 – 2033

Proposed Submission (incorporating proposed modifications) Examination in Public

**Hearing 1:
Policy J27
(20/09/2018)**

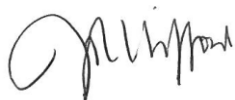
Issues 2, 3, 4 and 8

Parties: **Mid Devon District Council
Aviva Life & Pensions UK Ltd**

Date: **July 2018**

Signatures

Signature



.....
Jenny Clifford, Head of Planning, Economy and Regeneration
On behalf of Mid Devon District Council

Signature



.....
Robert Clarke, Senior Partner
Rapleys LLP on behalf of Aviva Life & Pensions UK Ltd

1 INTRODUCTION

- 1.1 This statement replaces and supersedes the statement signed by Mid Devon District Council and Friends Life Ltd (since acquired by Aviva Life & Pensions UK Ltd; any subsequent reference to Friends Life Ltd should be understood in this context) dated in August 2017 relating to Issues 2, 3, 4 and 8, as follows.
2. Has a regional need for the retail element and the comparison goods floorspace in particular, been demonstrated?
3. Has the 'sequential test' been approached with sufficient rigour?
4. Has the analysis of the potential impacts of the retail element (2 and 3 above) of the proposal properly fulfilled the duty to co-operate?
8. Can existing town centre uses be properly protected through planning controls?
- 1.2 The new statement addresses the following areas of common ground in relation to these issues. Issue 2 relates to the need for the retail element of the proposed Junction 27 site allocation in the emerging Local Plan. This issue is addressed in Section 2 of this Statement.
- 1.3 Issues 4 and 8 above relate to whether the scale and type of retail development proposed will have a significant adverse impact on town centres, planned investment and/or allocations. These issues are addressed in Section 3 of this Statement.
- 1.4 Issue 3 relates to the application of the sequential approach to site selection. This issue is addressed in Section 4 of this Statement. Also related to the sequential approach is Issue 5 which addresses the 'synergy' between the Outlet Shopping Village, tourism and leisure elements of the proposed allocation. Issue 5 has been addressed in a separate statement of common ground.
- 1.5 CBRE prepared a Town Centre Uses Statement (April 2015) on behalf of the developer. This statement was independently reviewed by Lichfields (previously NLP), and the findings of this review were set out in Lichfields' critique report (July 2015). Lichfields undertook additional analysis to provide a more robust evidence-based assessment of the EW proposals, as set out in Lichfields' addendum critique (March 2016). Following Lichfields' critique, a revised scheme was submitted as part of representations to the Proposed Submission Local Plan, and CBRE updated the Town Centre Uses Statement (August 2016).
- 1.6 The evidence set out in these previous reports now needs to be reviewed. This statement has been prepared to assist the Inspector by updating evidence, and by addressing issues raised by the

Inspector and relevant representations. This statement not only replaces the previous statement of common ground, but also supersedes, replaces and expands on the evidence contained within Lichfields' previous reports. It also updates, where relevant, the evidence contained within the CBRE reports (and, by association, their statements).

2 RETAIL NEED

Relevant Issue

2. Has a regional need for the retail element and the comparison goods floorspace in particular, been demonstrated?

- 2.1 This matter was addressed in CBRE's Town Centre Uses Statement (April 2015 and updated August 2016), although these statements did not fully address commitments and allocations within the wider region. To address issues raised by objectors, the retail need assessment prepared by CBRE has been updated and refined to address the specific issues raised, including additional analysis of commitments and allocations, as shown in Appendix A of this Statement.

Planning policy and guidance

- 2.2 Planning for town centre uses is addressed at paragraph 23 of the NPPF. It explains that in drawing up Local Plans, local planning authorities should:

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.

Overall approach to the assessment of need

- 2.3 It is appropriate to consider need in both qualitative and quantitative terms:
- qualitative need typically exists where there is, for example, poor consumer choice and an inadequate distribution of facilities; and
 - quantitative need for A1 retail floorspace typically arises where there is, or will be, an imbalance between the turnover capacity of existing facilities and available expenditure in any given area.
- 2.4 Both qualitative and quantitative need for the proposed retail allocation in Policy J27 can be demonstrated.
- 2.5 In this case, the need for the retail floorspace must be seen in the context of its ability to:
- Help deliver a step-change in the tourism offer in Mid Devon, by acting as an attraction and one of a range of attractions between which there will be linked trips (an issue addressed in the statement of common ground between the two parties dealing with issues 1, 5, 6 and 7); and
 - Facilitate the development of other elements of the scheme sought by the allocation (an issue addressed in the statement of common ground between the two parties dealing with issues 1, 5, 6 and 7).

Assessment of qualitative need

- 2.6 Qualitative need is a subjective concept, but of the factors frequently identified as components of qualitative need, three are particularly relevant in this case:
- deficiencies or 'gaps' in existing provision;
 - consumer choice and competition; and
 - the quality of existing provision.
- 2.7 In terms of the comparison goods element, the south west is currently served by the following outlet villages/centres:
- Atlantic Village, Bideford (around 50 mins from Tiverton by car)
 - Clarks Village, Street (around 50 mins from Tiverton)
 - Gloucester Quays (around one hour 35 mins from Tiverton)
 - Wilton Shopping Village, Salisbury (around one hour 35 mins from Tiverton)
 - Swindon Designer Outlet (around one hour 45 mins from Tiverton)
 - Poole Pottery Factory Outlet (around one hour 50 mins from Tiverton)
 - Dolphin Quay, Poole (around one hour 50 mins from Tiverton)
- 2.8 All but one of these is located north or east of Tiverton, meaning that anyone living or holidaying south or west of the town will need to travel for a significant time. The only outlet village which does lie south or west of Tiverton is Atlantic Village, but it:
- only serves as an outlet village to a limited degree with, for example, Asda, Aldi and Poundland forming part of the retail offer;
 - lacks many of the 'higher end' brands typically associated with outlet villages; and
 - is located on the coast and is not well placed to serve passing trade in a way which a more centrally located outlet village would be.
- 2.9 That implies a significant qualitative deficiency in the south west region, particularly the area to the south and west of Tiverton. The proposed designer outlet village (DOV) at Junction 27 would help to address that deficiency by improving the distribution of factory outlets across the south west, thereby improving customer choice and helping to provide a diverse retail offer, both of which are aims identified in the NPPF (paragraph 23, bullet 4).
- 2.10 In addition, the DOV would function as an important component in the mix of attractions that would entice people to visit the proposed tourist destination.

- 2.11 It is agreed, therefore, that the proposed shopping village would help to meet an identified qualitative need which arises at a regional level.
- 2.12 The proposed agronomy centre includes up to 1,000sqm of ancillary retail floorspace, forming an integral part of this attraction. It would provide an opportunity for related food and drink products from a range of producers across Devon and the region to be showcased and sold within the agronomy centre. Although some farm shops and similar outlets operate in Devon and the wider area, most simply sell products from single providers. As such, the area lacks a base from which a range of products can be sold. Ancillary retail floorspace at the agronomy centre would address this qualitative deficiency, improving customer choice and improving the diversity of the retail offer, as a component part of the visitor attraction.

Quantitative Floorspace Capacity

- 2.13 The proposed Food Hall within the agronomy centre forms part of the ancillary retail floorspace referred to above. It will cater for the needs of tourists visiting the agronomy centre and will help to serve a local need. Notwithstanding the tourism role, the need for the scale of convenience goods floorspace proposed can also be demonstrated on a local basis.
- 2.14 The study area adopted for the retail assessment is explained and shown in Appendix A. Mid Devon District approximately equates to Zones 12 and 14. Total available convenience goods expenditure in these two zones is expected to increase from £182 million in 2014 to £199 million in 2033, i.e. total growth of +£17 million. The Food Hall's convenience goods turnover (£7.44 million) is less than half the projected growth in expenditure in the Mid Devon zones (12 and 14) i.e. +£17 million between 2014 and 2033. The convenience goods turnover is also lower than the growth in spending between 2014 and 2025.
- 2.15 As regards the DOV, there is nothing in the NPPF to suggest that development within an authority area should serve only residents who live within that authority area. Such an approach would be inappropriate and unduly restrictive, because it would fail to recognise that shopping catchment areas over-lap, and that catchment areas are rarely the same, or even similar, to local authority boundaries. With that in mind, the two parties agree that the quantitative need arises on a regional basis; that is, it is not based on seeking to secure the expenditure available from residents of Mid Devon alone.
- 2.16 The two parties also agree there is sufficient expenditure growth to support the proposed retail floorspace over and above commitments and allocations within the likely catchment area.
- 2.17 The two parties have reached this conclusion based on their analysis of:

- Town Centre Uses Statement for Local Plan Proposed Submission Consultation (section 5 and appendices E and F), CBRE for Friends Life Ltd, 27 April 2015;
- Town Centre Uses Statement (updated) (section 5 and appendices E and F), CBRE for Friends Life Ltd, 3 August 2016;
- Retail Response (paragraphs 2.16 to 2.50), NLP (now Lichfields) for MDDC, 19 July 2016;
- Critique of Retail and Leisure Statement (section 2), NLP (now Lichfields) for MDDC, 7 March 2016; and
- the updated retail capacity figures set out in Appendix A of this Statement.

- 2.18 The updated retail capacity projections are set out in Appendix A, based on the CBRE approach and have been jointly prepared and agreed by Lichfields and Rapleys, acting on behalf of MDDC and Aviva Life & Pensions UK Ltd respectively. Appendix A quantifies the capacity for comparison goods retail floorspace within the core catchment and the outer area.
- 2.19 The combined comparison goods turnover of all retail destinations/facilities within the core catchment area is £5,123 million in 2014 as shown in Table 5 in Appendix A, and based on the CBRE market shares shown in Table 4. Base year comparison goods shopping patterns have been projected forward to 2018, 2025, 2029 and 2033 based on constant market shares. The projected expenditure patterns are shown in Tables 6 to 9 in Appendix A and the results are summarised in Table 17.
- 2.20 Base year expenditure retained and attracted to the core catchment area is projected to increase from £5,123 million in 2014 to £5,819 million in 2018 due to expenditure and population growth. Available expenditure will continue to grow to £7,299 million in 2025, increasing to £8,451 million in 2029 and £9,752 million in 2033. In total expenditure is projected to increase by £4,629 million (+90%) between 2014 and 2033, including over 13% growth related to population increases.
- 2.21 Base year expenditure retained and attracted to the outer zones is projected to increase from £7,518 million in 2014 to £8,584 million in 2018, increasing to £10,824 million in 2025, £12,565 million in 2029 and £14,541 million in 2033. In total the outer area's available expenditure is projected to increase by £7,023 million between 2014 and 2033.
- 2.22 Not all expenditure growth outlined above will be available to support new development. Experian information suggests turnover densities increased by 12.3% between 2014 and 2018, and are forecast to increase by 16.6% between 2018 and 2025. Experian's long-term turnover efficiency growth rate after 2025 is 2.2% per annum.

- 2.23 Based on Experian's recommended turnover efficiency growth rates existing floorspace within the core catchment area is expected to absorb £628 million of expenditure growth between 2014 and 2018, as shown in Table 17 in Appendix A. Continued increases in turnover efficiency will absorb £953 million between 2018 and 2025.
- 2.24 Completed and pipeline commitments growth in the core catchment area are expected to have a combined comparison goods turnover of £463 million in 2025 (see Table 10A in Appendix A), which will absorb further expenditure growth.
- 2.25 Allowing for growth in turnover efficiencies and planned commitments, residual surplus expenditure available to support further development/allocations (over and above commitments) is estimated to be £132 million in the core catchment area at 2025, as shown in Table 17. This expenditure surplus is expected to increase to £632 million in 2029 and £1,223 million in 2033.
- 2.26 In the outer area, residual surplus expenditure available to support further development (over and above commitments) is estimated to be £490 million at 2025. Commitments within the outer area are shown in Table 10B in Appendix A. This expenditure surplus is expected to increase to £1,292 million in 2029 and £2,243 million in 2033.
- 2.27 The surplus comparison goods expenditure estimates set out above have been converted into new floorspace projections in Table 18 in Appendix A. Floorspace projections are based on an average sales density of £6,000 per sq.m net sales in 2018, inflated to 2025 and beyond based on Experian's sales density forecasts. An average net sales to gross ratio of 75% has been adopted.
- 2.28 The floorspace projection (over and above commitments) for the core catchment area is 18,931 sq.m net sales (25,241 sq.m gross) by 2025, increasing to 82,861 sq.m net sales (110,481 sq.m gross) by 2029 and 146,936 sq.m net sales (195,915 sq.m gross) by 2033. Development plan allocations within the core catchment area should seek to address the residual floorspace capacity in line with projections up to 2025, 2029 and 2033.
- 2.29 The combined comparison goods floorspace projection for the whole study area is 89,045 sq.m net sales (118,727 sq.m gross) by 2025, increasing to 252,206 sq.m net sales (336,275 sq.m gross) by 2029 and 416,406 sq.m net sales (555,209 sq.m gross) by 2033.
- 2.30 As indicated earlier, Mid Devon District approximately equates to Zones 12 and 14, as shown in Appendix A. Total available comparison goods expenditure within these two zones is expected to increase from £204 million in 2014 to £291 million in 2025, and then £337 million in 2029 and £388 million in 2033. Total growth is +£87 million by 2025, +£133 million by 2029 and +£184 million by 2033.

- 2.31 The 2014 household survey results suggested the comparison goods turnover of facilities within Mid Devon District was only £75 million in 2014, which suggests the net retention of expenditure (allowing for in and outflows) was 37% (£75 million compared with total available expenditure of £204 million in Zones 12 and 14).
- 2.32 Allowing for Experian's growth in turnover efficiencies, the comparison goods turnover of existing facilities in Mid Devon should grow from £75 million in 2014 to £98 million in 2025, and then to £107 million in 2029 and £116 million in 2033. These increases should absorb £23 million of the expenditure growth by 2025, predominantly in Zones 12 and 14, and £32 million by 2029 and £41 million by 2033. This growth in turnover efficiency to 2025 (£23 million) accounts for only 26% of total growth in expenditure (£87 million), which leaves £64 million of additional growth. At 2029, growth in turnover efficiency (£32 million) accounts for only 24% of total growth in expenditure (£133 million), which leaves £101 million of additional growth. By 2033 the residual expenditure is £143 million.
- 2.33 The estimated comparison goods turnover of the proposed DOV is £66.89 million at 2025. Based on Experian's forecast growth in turnover efficiencies, this turnover would increase to £73.55 million by 2029 and £80.87 million in 2033. The 2025 turnover (£66.89 million) exceeds the residual expenditure growth (£64 million) in Zone 12 and 14 by less than £3 million. By 2029, the projected turnover (£73.55 million) accounts for less than 73% of the residual expenditure growth (£101 million). Finally by 2033, the projected turnover (£80.87 million) accounts for less than 57% of the residual expenditure growth (£143 million).
- 2.34 The DOV's projected comparison goods turnover (£66.89 million increasing to £80.87 million) equates to about 50% of the projected surplus expenditure within the core catchment area at 2025, but this reduces to less than 12% by 2029 and less than 7% in 2033. The DOV comparison turnover estimates equate to less than 11% of the surplus expenditure capacity identified in the combined study area at 2025, but this reduces to about 3% by 2029 and then 2% by 2033. The DOV's turnover is insignificant in the context of projected expenditure growth.
- 2.35 To support growth in turnover efficiencies (£75 million to £116 million) and the DOV (£67 million to £81 million), Mid Devon District's net retention of comparison expenditure within Zones 12 and 14 would need to increase from 37% (as achieved in 2014) to about 57% in 2025, reducing to 54% in 2029 and then 51% in 2033. This uplift in net expenditure retention is not unreasonable, given Mid Devon District's very low base year retention (37%).
- 2.36 These figures indicate that the proposed DOV represents a relatively small proportion of residual expenditure growth within the catchment area, available to support development over and above planned commitments.

- 2.37 Table 18 in Appendix A indicates the global capacity for comparison goods floorspace (over and above commitments) within the core catchment area is 146,936 sq.m net sales (195,915 sq.m gross), supported by surplus expenditure growth of £1,223 million at 2033. A list of development plan allocations that are expected to include comparison goods retailing, not already included within the list of commitments, is shown in Table 10C in Appendix A.
- 2.38 If all comparison goods allocations were implemented then 149,900 sq.m gross of comparison goods floorspace could be provided. This figure equates to about 76% of the total comparison goods retail floorspace capacity at 2033 (195,915 sq.m gross) for the core catchment area.
- 2.39 In the unlikely event that all allocations were implemented and completed by 2033, the comparison goods capacity projections suggest there would still be residual capacity for about 46,000 sq.m gross by 2033, which still leaves more than sufficient capacity to support the proposed DOV (13,935 sq.m gross). More realistically, however, it can be expected that the allocations will not be implemented as a whole. In such circumstances, post the DOV coming on stream, there would still be sufficient capacity to accommodate circa 11,000 sq.m gross of allocated floorspace, in the core catchment, at 2025 and, thereafter, approximately 100,000 sq.m gross at 2029.

Conclusions on regional need

- 2.40 It is common ground that the evidence base demonstrates that there is a regional need for the retail element of the Junction 27 allocation, both in qualitative and quantitative terms.

3 RETAIL IMPACT

Relevant Issues

3.1 The following interrelated issues are addressed in this Section:

4. Has the analysis of the potential impacts of the retail element of the proposal properly fulfilled the duty to co-operate?

8. Can existing town centre uses be properly protected through planning controls?

3.2 These matters were addressed in CBRE's Town Centre Uses Statement (April 2015 and updated August 2016), and critiqued by Lichfields. The retail impact assessment prepared by CBRE has been updated and refined to address the specific issues raised, as shown in Appendix A of this statement.

3.3 In assessing the likely impact of the proposed DOV, it should be noted that the nature and role of the proposed development is very different to traditional high street shopping destinations within town centres, and this concept is widely recognised, including recent appeal decisions. It is agreed that the nature and role of the proposed DOV can be appropriately controlled through restrictive planning conditions. The characteristics of outlet shopping, and the notable differences between this form of retailing and that ordinarily found within the high street, are described more fully within: the GL Hearn submissions made on behalf of Aviva Life & Pensions Ltd (formerly Friends Life Ltd) to the Regulation 19 consultation in April 2015 (Appendix I); within the GL Hearn Hearing Statement on behalf of Aviva Life & Pensions Ltd - Matter 5 (August 2017); and within the Mid Devon District Council Hearing Statement - Matter 5 (August 2017).

Basis on which the duty to cooperate is engaged

3.4 It is agreed that section 33A of the Planning and Compulsory Purchase Act 2004 (as amended) provides that the duty to cooperate is engaged in relation to certain specified activities, including the preparation of development plan documents, so far as they relate to a 'strategic matter'.

3.5 It is agreed that section 33A indicates that, in single tier authorities, a strategic matter is (emphasis added):

Sustainable development or use of land that has or would have a significant impact on at least two planning areas, including (in particular) sustainable development or use of land for or in connection with infrastructure that is strategic and has or would have a significant impact on at least two planning areas.

- 3.6 It is agreed, therefore, that the potential impacts of the retail element of the development sought by the draft allocation of land at Junction 27 would only constitute a 'strategic matter' for the purposes of the duty to cooperate if a significant impact on at least two planning areas was likely to arise.

Extent to which a significant impact arises

- 3.7 The Planning Practice Guidance advises that when considering impact in the plan-making process, issues of adverse impact should not arise if the Local Plan is based on meeting the assessed need for town centre uses in accordance with the sequential approach.
- 3.8 It is agreed, therefore, that if there is a demonstrable need for the development sought in the draft allocation and it satisfies the sequential test (as shown in Section 4 of this statement), a significant adverse impact will not arise. That is the case here and, therefore, the duty to cooperate is not engaged.
- 3.9 In any case, leaving aside any assessment of need or the application of the sequential test, the two parties agree that no significant impact will arise, based on their analysis in:
- Town Centre Uses Statement for Local Plan Proposed Submission Consultation (section 5 and appendices E and F), CBRE for Friends Life Ltd, 27 April 2015;
 - Town Centre Uses Statement (updated) (sections 8, 9 and 10), CBRE for Friends Life Ltd, 3 August 2016;
 - Town Centre Uses Statement (updated) – supplementary, CBRE for Friends Life Ltd, 6 September 2016;
 - Critique of Retail and Leisure Statement (sections 8, 9 and 10), Lichfields (formerly NLP) for MDDC, 7 March 2016; and
 - the updated retail impact figures set out in Appendix A of this Statement.
- 3.10 The updated retail impact figures are based on the CBRE approach and have been jointly prepared and agreed by Lichfields and Rapleys, acting on behalf of MDDC and Aviva Life & Pensions UK Limited respectively.
- 3.11 The agreed conclusion on impact has been reached based on an assessment of the key considerations as set out in the Planning Practice Guidance, namely:
- Whether there would be an impact on existing, committed and planned public and private investment, or on the role of centres (paragraph 014, reference ID 2b-014-20140306)
 - Whether there would be an impact on the vitality and viability of existing town centres (paragraph 017, reference ID: 2b-017-20140306)

- 3.12 The assessments of impact were also undertaken in the context of paragraph 14 of the NPPF (emphasis added):

Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless ... any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole ...

- 3.13 Both parties agree that significant regional benefits arise from the proposal and that, so far as any adverse impacts arise (none of which are significant), they are clearly outweighed by the benefits.
- 3.14 Considering the above, it is agreed that the duty to cooperate is not engaged by reference to the potential impacts of the retail element of the proposed allocation.

Extent to which duty to cooperate is discharged in the event that the duty is engaged

- 3.15 Notwithstanding the rationale set out and agreed above, if any party determined that the duty to cooperate is engaged in respect of retail matters, it is agreed that duty has clearly been discharged, as demonstrated in the Duty to Cooperate Statement prepared by MDDC and dated March 2017, most notably in the section headed 'Economy, Retail and Leisure' and in Appendix A, which provides a non-exhaustive list of meetings with duty to cooperate partners, one of which was attended by MDDC's retail planning consultant, Lichfields (then known as NLP).

Updated impact estimates

- 3.16 Cumulative impact (i.e. accounting for recent development, under-construction schemes, extant planning permissions or allocations) is not referred to in the NPPF. The need to consider the cumulative impacts of commitments or recent developments is not a policy requirement. Even if commitments are not explicitly mentioned in the NPPF impact tests, they will be "other material considerations" that the decision-taker may take account of, and attach weight to, not least because they may affect the vitality and viability of a town centre over the plan period.
- 3.17 For these reasons a robust approach has been adopted, and the cumulative comparison goods retail impact of planned commitments along with the proposed DOV have been assessed. The assessment tests the short, medium and longer-term impacts. The key results for the design year are summarised below. The main destinations within the catchment area where the cumulative impacts of commitments and the DOV are -5% or worse are shown overleaf.

Cumulative Comparison Goods Impact Summary

| | Commitments cumulative impact | Jct 27 DOV solus impact | DOV/commitments cumulative impact |
|----------------------------|----------------------------------|----------------------------|--------------------------------------|
| Barnstaple | -10.6 | -1.4 | -11.9 |
| Exeter | -8.1* | -1.3 | -9.3* |
| Tiverton | -3.4 | -5.9 | -9.1 |
| Atlantic Village, Bideford | -7.0* | -1.9 | -8.8* |
| Bridgwater | -7.4 | -0.3 | -7.6 |
| Weston-super-Mare | -7.4* | -0.2 | -7.6* |
| Taunton | -6.1* | -1.5 | -7.5* |
| Plymouth | -7.0* | -0.1 | -7.1* |
| Cullompton | -1.7 | -5.0 | -6.7 |
| Clarks Village, Street | -5.7 | -0.9 | -6.6 |
| Weymouth | -6.4 | -0.1 | -6.5 |
| Dorchester | -6.3* | -0.1 | -6.4* |
| Honiton | -3.4 | -3.0 | -6.4 |
| Tavistock | -5.6 | -0.1 | -5.7 |
| Launceston | -5.5 | -0.1 | -5.6 |
| Bideford | -5.0 | -0.4 | -5.3 |
| Newton Abbott | -4.9 | -0.3 | -5.2 |

* includes internal impacts from in-centre commitments

- 3.18 The solus impact figures for the DOV range from less than -0.1% to -5.9%, with the highest proportional impact falling on Tiverton. The solus levels of impact on the comparison goods facilities within most centres are expected to be much less than -0.5%, which represents less than 2 month's growth in comparison goods expenditure. Town centre health checks have been undertaken where the solus impact of the DOV is above -0.4%, as shown in Appendix B. Health checks have also been undertaken for Wellington and Clevedon due to issues raised by objectors, although no discernible trade diversion or impact is predicted for these two lower order centres. Lower order centres are less likely to compete directly with the DOV.
- 3.19 The cumulative impacts of commitments and the DOV at 2025 range from -0.3% to -11.9%. It should be noted that the impact of commitments, which accounts for most of the cumulative impacts identified, is likely to be felt earlier than 2025 and will have already been experienced by town centres, assuming all commitments are completed within three years and achieve full trading levels by 2023. These centres will have recovered due to expenditure growth between 2023 and 2025, therefore the cumulative impact figures at 2025 are notional.
- 3.20 The highest cumulative impact (-11.9%) is on Barnstaple. However, the cumulative impact of commitments on Barnstaple is -10.6% at 2025. The percentage impact for earlier design years for

these developments is likely to have been higher than -10.6%, and this level of impact was presumably considered acceptable when these planning applications were approved. The DOV is expected to increase impact on Barnstaple by 1.3 percentage points, which represents about 5 month's growth in comparison goods expenditure. This small increase in impact at a later design year cannot be significant in the context of previous planning decisions.

- 3.21 The next highest cumulative impacts fall on Exeter (-9.3%), Tiverton (-9.1%) and Atlantic Village (-8.8%). The impacts on Exeter and Atlantic Village include the internal impact of commitments within the centres i.e. the Bus and Coach Station development in Exeter and the proposed extension to Atlantic Village. The cumulative impact figures assume the Bus and Coach Station development in Exeter is implemented by 2025, but this now appears unlikely. In this respect cumulative impacts have been over-estimated. If implemented in-centre development will enhance rather than harm the vitality and viability of these centres. The solus impact of the DOV is insignificant i.e. -1.3% on Exeter and -1.9% on Atlantic Village.
- 3.22 The highest solus impact of the DOV falls on Tiverton (-5.9%), followed by Cullompton (-5%), due to the proximity of these centres to Junction 27.
- 3.23 It is necessary to consider these percentage reductions in trade in the context of: the relative health of the centre; the importance of the affected sector (e.g. comparison shopping) to the centre's vitality and viability; and the extent to which the centre's turnover is expected to grow in the future (excluding inflation).
- 3.24 In relation to the DOV and commitments, the cumulative impacts on all centres/destinations will be more than offset by expenditure growth between 2018 and 2025. Residual turnover levels will be higher at 2025 than the current 2018 turnover levels. It is agreed there is no accepted threshold for assessing whether a certain level of trade diversion or impact is acceptable or unacceptable. The acceptability of the impact levels shown above will depend on local factors and the timing of development. For example, a healthy vital and viable centre can withstand much higher levels of impact than a failing town centre.
- 3.25 The quantitative impact figures shown above should be considered in the context of the existing health and vitality of the centres and potential future investment. Town centre health check assessments have been undertaken for the main centres affected in the core catchment area, as shown in Appendix B. The results of these health checks demonstrate that all centres are currently vital and viable and in relatively good health. The cumulative impact results need to be viewed in this context.

- 3.26 In addition to assessing trade diversion and impact on existing businesses within town centres, the impact on existing, committed and planned public and private sector investment is relevant. Impact on planned investment in other centres is not an easy matter to quantify, because it can involve second guessing investors and lenders decisions. The decision to proceed with investment will not always be based on trade diversion estimates or expenditure capacity, but ultimately on operator demand. Operator demand is often the subjective judgement of potential occupiers. The nature of development, the catchment area it will serve and the progress or timing of development need to be considered. The quantitative need assessment in Section 2 demonstrates there will be sufficient expenditure growth within the core and outer catchment areas to support commitments, allocations and the proposed DOV.

Conclusions on whether the analysis of the potential impacts of the retail element of the proposal properly fulfilled the duty to co-operate

- 3.27 It is agreed that there is a clear regional need for the proposal and that the sequential test has been satisfied (see Section 4 of this statement). As a result, the issue of impact should not arise and the duty to cooperate is not engaged so far as it relates to retail.
- 3.28 It is also agreed that analysis of potential impacts undertaken for Aviva Life & Pensions UK Ltd and by Lichfields for MDDC demonstrates that, notwithstanding any assessment of need or the application of the sequential test, no significant adverse impacts arise. As a result, the duty to cooperate is not engaged so far as it relates to retail.
- 3.29 Finally, and notwithstanding the foregoing conclusions, it is agreed that so far as the duty to cooperate is engaged, the duty has been discharged, as explained in the Duty to Cooperate Statement prepared by MDDC.

Planning controls on Outlet Shopping Villages

- 3.30 As indicated in this Section, it is agreed that the impact of the proposed DOV on existing town centres and allocations would not be significant. One of the reasons for this is the way that the proposed DOV will function means that it would not compete directly with mainstream retailers in nearby town centres.
- 3.31 The typical function of an outlet shopping village is to offer members of the public an opportunity to browse and to purchase, usually at a discount, branded seconds, surplus stock and discontinued lines, with the products typically being clothes, shoes and accessories, together with homewares. Outlet shopping villages are, due to the restricted range and type of goods that they sell, rarely suitable for 'day-to-day' comparison goods shopping, and they are therefore visited infrequently. The effect of this is that town centres (and any existing out of centre retail provision) would continue

to be the main destination for most comparison goods shopping, and that the existing town centre uses (in particular shops) would be protected. Paragraph 3.3 above cites the references within the evidence base that address the differences between outlet shopping and conventional high street retail.

3.32 It is agreed that a condition (or conditions) could be imposed upon any future planning permission which would ensure that the outlet shopping village functions and operates as intended, thereby ensuring that town centres would continue to be the main destination for comparison goods shopping and, in turn, ensuring that existing town centre uses are protected. That condition (or conditions) would restrict:

- The range of goods that may lawfully be sold, e.g. clothes, shoes and accessories and homewares
- The type of goods that may lawfully be sold, e.g. branded seconds, surplus stock and discontinued lines
- The relative price at which most goods may lawfully be sold, e.g. the percentage discount from the price at which the goods would ordinarily have been sold, had they not been seconds, surplus stock or discontinued lines

3.33 This approach is reflected in two recent decisions to grant planning permission for outlet shopping villages, at Scotch Corner and at Tewkesbury. The Secretary of State granted permission for the Scotch Corner development following a call-in inquiry, whilst planning permission was granted for the Tewkesbury development by the local planning authority.

3.34 The conditions of relevance that were imposed in the case of the Tewkesbury outlet shopping village (Tewkesbury Borough Council ref 13/01003/OUT) were:

- i. All retail sales from the Class A1 floorspace in the FOC shall only be by manufacturers selling their branded seconds, surplus stock, or discontinued lines or other retailers selling rejects, returned goods, seconds, clearance goods and surplus stock, all at discounted prices.
- ii. *Not less than 85% of the total gross Class A1 retail floorspace of the FOC shall offer goods for sale at a price at least 30% below either recommended retail price (if available) or, if that price is not available, the price at which such a good is, or has been, offered for sale at the manufacturers' or their retailers' high street outlets.*
- iii. *The remainder of the total gross Class A1 retail floorspace of the FOC shall offer goods for sale at a price at least 10% below either recommended retail price (if available) or, if that price is not available, the price at which such a good is, or has been, offered for sale at the manufacturers' or their retailers' high street outlets.*
- iv. *The retail units other than those in Class A3, A4 and A5 shall not be used for any of the purposes within Class A1 of the Town and Country Planning (Use Classes) Order 1987 as*

amended other than for the sale of goods by way of factory outlet shopping. The Class A1 retail units shall not be used for the sale of convenience goods, DIY goods, tools, garden furniture, carpets, floor covering, electrical/gas goods/appliances, hardware, motor vehicle spares and accessories.

- 3.35 The condition of relevance that was imposed in the case of Scotch Corner (Richmondshire District Council ref 14/687/FUL and 15/00806/FUL; PINS ref APP/V2723/V/15/3132873 and APP/V2723/V/16/3143678) was:

In at least 90% of the floor space within the buildings subject to this permission that is used for sales to members of the public, any goods offered for sale shall be priced at least 20% below the normal price at which similar types of merchandise are or have been offered for sale in their usual place of sale. The operator of the retail floor space shall maintain detailed stock records of goods for sale and pricing, and shall upon written request from the local planning authority produce these records for the previous 12 months for inspection within 2 calendar weeks of the date of request.

- 3.36 It is agreed that a condition (or conditions) could be imposed on any permission for an outlet shopping village at Junction 27, and that if such a condition (or conditions) was worded in a similar way to the conditions for the Tewkesbury and Scotch Corner developments, it would meet the tests set out in paragraph 206 of the NPPF, in that the condition (or conditions) would be:

- Necessary – the condition would be required to ensure that there would be no significant diversion of trade from town centre stores, thereby ensuring the vitality and viability of centres is maintained
- Relevant to planning – maintaining the vitality and viability of town centres is a key component of national planning policy in England, and the condition would clearly be relevant to meeting that objective
- Relevant to the development to be permitted – the condition would specifically restrict the ability of the outlet shopping village to operate, that being the main element of any potential development at Junction 27
- Enforceable – the Scotch Corner example above demonstrates that it is entirely possible to ensure the condition is enforceable, not least by placing an obligation on operators to keep and provide on request records of goods being sold
- Precise – the examples above demonstrate that it is possible to clearly identify the range and type of goods which may be sold and the price point at which they may be sold; it is also entirely possible to provide, if required, a more detailed definition of, for example, ‘branded seconds’, ‘surplus stock’ and ‘discontinued lines’
- Reasonable in all other respects – (a) outlet shopping is a specialist form of retail which, if not suitably controlled, has the potential to give rise to adverse impacts; it is, therefore, entirely appropriate to restrict the operation of an outlet shopping village; (b) given the reliance on the typical function and operational characteristics of an outlet shopping village in demonstrating its

acceptability, it is entirely reasonable for outlet shopping village operators to be obliged to demonstrate that they are operating in a manner that is consistent with that function; that is, in any case, information that those operators (or the occupiers) will have as a matter of course.

Conclusion on whether existing town centre uses can be properly protected through planning controls

- 3.37 The two parties agree that it is entirely possible to protect existing town centre uses through planning controls on the DOV.

4 SEQUENTIAL TEST

Relevant Issue

4.1 The following issue is addressed in this Section:

3. Has the 'sequential test' been approached with sufficient rigour?

4.2 Also related to the sequential approach is Issue 5, which addresses the 'synergy' between the Outlet Shopping Village, tourism and leisure elements of the proposed allocation. Issue 5 has been addressed in a separate statement of common ground.

4.3 These matters were addressed in CBRE's Town Centre Uses Statement (April 2015 and updated August 2016). A further update schedule of sequential sites and allocations is now shown in Appendix C of this statement.

Planning policy and guidance

4.4 The NPPF (paragraph 23) states that local planning authorities should:

- allocate a range of suitable sites to meet the need for town centre uses over the plan period;
- assess the need to expand town centres and, if suitable town centre and edge-of-centre sites cannot be identified, then other accessible locations that are well connected to town centre should be allocated.

4.5 The Planning Practice Guidance says (paragraph 009; reference ID: 2b-009-20140306) that:

In plan-making, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It requires clearly explained reasoning if more central opportunities to locate main town centre uses are rejected.

4.6 It is agreed the sequential approach requires:

- a thorough assessment of the suitability, viability and availability of locations for main town centre uses; and
- clearly explained reasoning if more central opportunities to locate main town centre uses are rejected.

4.7 The Planning Practice Guidance also provides a checklist of matters that should be considered when taking a sequential assessment to plan-making (paragraph 009; reference ID: 2b-009-20140306):

- *Has the need for main town centre uses been assessed? The assessment should consider the current situation, recent up-take of land for main town centre uses, the supply of and demand for land for main town centre uses, forecast of future need and the type of land needed for main town centre uses*
- *Can the identified need for main town centre uses land be accommodated on town centre sites? When identifying sites, the suitability, availability and viability of the site should be considered, with regard to the nature of the need that is to be addressed*
- *If the additional main town centre uses required cannot be accommodated in town centre sites, what are the next sequentially preferable sites that it can be accommodated on?*

4.8 There is no additional guidance on the meaning of suitability, availability and viability in the NPPF or Planning Practice Guidance, but the Government's Guidance on Need, Impact and the Sequential Approach identified several considerations (at paragraphs 6.37 to 6.50). Whilst the guidance document was withdrawn in 2014, it is agreed that the considerations it sets out are entirely relevant.

The approach required for a rigorous application of the 'sequential test'

4.9 It is agreed that a rigorous application of the 'sequential test' requires that the approach set out in national policy and guidance is followed. It is also agreed that this approach has been taken here, and that the conclusion drawn – that the proposed allocation is sequentially preferable – is based on sound analysis. The basis on which the two parties have reached that view is set out below.

The approach taken

PPG matter #1: Has the need for main town centre uses been assessed?

4.10 It is agreed that there is both a qualitative and quantitative need, at a regional scale, for an outlet shopping village, for the reasons explained in Section 2 of this Statement.

4.11 It is also agreed, again as set out in section 2, that the need for the retail floorspace must also be seen in the context of its ability to:

- help deliver a step-change in the tourism offer in Mid Devon, by acting as an attraction and one of a range of attractions between which there will be linked trips (an issue addressed in the statement of common ground between the two parties dealing with issues 1, 5, 6 and 7); and
- facilitate the development of other elements of the scheme sought by the allocation (an issue addressed in the statement of common ground between the two parties dealing with issues 1, 5, 6 and 7).

- 4.12 There is a clear need for co-location of the retail floorspace with the other uses sought in the allocation, as addressed in relation to Issue 5 and the synergy between uses. Each element of the development sought by the draft allocation is a critical and integral component of an overall scheme of development intended to deliver a major tourist destination in Mid Devon that acts as a gateway attraction, accessible to the M5 where it can capture passing tourist trade. That is a key element of Mid Devon's wider strategy.
- 4.13 It is agreed in this context the disaggregation of different elements of the development would fail to reflect the underlying commercial logic and planning rationale for the scheme. In any case, whilst paragraph 24 of the NPPF indicates that (in a development management context) applicants should demonstrate flexibility on issues such as format and scale, it does not require the applicant to disaggregate the scheme.
- 4.14 The NPPF contains no specific guidance on the issue of disaggregation in the context of plan-making, and there is no proper basis for requiring disaggregation in this context when it is not required in development management decision-making.
- 4.15 It is agreed it is right and proper to search for sites which can accommodate the uses sought by the allocation at one single location. That would require a site of c28ha. That is the approach followed by CBRE in their evidence submitted during the plan-making process:
- Town Centre Uses Statement for Local Plan Proposed Submission Consultation (paragraphs 7.7 to 7.14), CBRE for Friends Life Ltd, 27 April 2015; and
 - Town Centre Uses Statement (updated) (paragraphs 7.7 to 7.15), CBRE for Friends Life Ltd, 3 August 2016.
- 4.16 The concerns about the approach to disaggregation raised by Montagu Evans (in representations for The Crown Estate and TH Real Estate dated 14 February 2017), by Taunton Deane Borough Council (in representations dated 13 February 2017) and by Exeter City Council (in representations dated 13 February 2017) are unfounded (for the reasons cited above).
- 4.17 On the basis that the proposed allocation cannot be disaggregated and maintain its functional objectives (a multi-faceted visitor attraction), sites of around 28 hectares would be required to accommodate the proposed development. Some objectors have suggested the DOV can be disaggregated and on this basis sites of around 4 hectares may be suitable. It is agreed, in the context of the type of development that the allocation seeks to deliver, that this approach is not appropriate.
- 4.18 Notwithstanding that there is a justifiable and sound basis under the policy to accommodate the proposed development on a single site, the updated sequential analysis in Appendix C also

assesses the availability of sites to accommodate a DOV on a site of around 4 hectares (alongside consideration of the whole development) in isolation from the other uses contained within the policy. This analysis demonstrates there are no suitable and available alternative sites that are sequentially preferable on which to accommodate the development proposals either in full or in the form of a DOV without the other components contained within the policy.

PPG matter #2: Can the identified need for main town centre uses land be accommodated on town centre sites?

PPG matter #3: If the additional main town centre uses required cannot be accommodated in town centre sites, what are the next sequentially preferable sites that it can be accommodated on?

- 4.19 It is agreed that the first step at this point is to identify the area of search for sites to accommodate the uses sought in the draft allocation. That area must be identified in the context of the key objective of the proposals: to provide a major tourist destination for Mid Devon and the south west that acts as a gateway attraction for the region, accessible to the M5 where it can capture passing tourist trade.
- 4.20 Tiverton is ideally located, given that it is within a 90-minute drive of almost all the south west of England (as is evident from the map at Appendix C of CBRE's Town Centre Uses Statement (updated), 3 August 2016), thereby allowing development at that location to serve residents and holidaymakers across the region. A development located up to 30-minutes' drive from Tiverton would also be able to serve largely the same area. A development that is up to 60-minutes' drive from Tiverton is, however, less likely to be able to properly serve the south west region. Were it to locate in Yeovil, for example, the entire area south west of the Dartmoor National Park would fall outside a 90-minute drivetime. Similarly, were it to locate in, say, Okehampton, the development could not realistically serve residents and holidaymakers beyond Yeovil. In other words, development located more than 30 minutes from the proposed location of the development would not meet the regional need that has been identified.
- 4.21 The concerns about the area of search raised by Montagu Evans (in representations for The Crown Estate and TH Real Estate dated 14 February 2017), Rocke Associates/Planning Potential (in representations for Hermes dated 13 February 2017) and by North Devon Council (in representations dated 14 February 2017) are, therefore, unfounded (for the reasons cited above).
- 4.22 Previously, on this basis, it was agreed that the next step should be to assess potential alternative sites within the 30-minute drive time. However, in response to representations and to assist the Inspector, a wider area of search has been considered in Appendix C of this statement, i.e. a core catchment that equates to a 60-minute drive time area.

- 4.23 As we note above, the Planning Practice Guidance advises that when identifying sites, their suitability, availability and viability should be considered, regarding the nature of the need that is to be addressed. That need is as set out above, and provides the basis for the sequential assessments by CBRE (for Friends Life Ltd, now acquired by Aviva Life & Pensions UK Ltd), as now updated by Lichfields (for MDDC) and Rapleys (for Aviva Life & Pensions UK Ltd).
- 4.24 The sequential assessment is set out in:
- Town Centre Uses Statement (updated) (section 7), CBRE for Friends Life Ltd, 3 August 2016;
 - Critique of Retail and Leisure Statement (section 4), Lichfields (formerly NLP) for MDDC, 7 March 2016; and
 - The updated sequential analysis as shown in Appendix C of this Statement.
- 4.25 A thorough assessment of all relevant sites has been undertaken. The assessment clearly demonstrates there are no town centre, edge of town centre or out of centre sites that are suitable and available, and therefore, sequentially preferable to the proposed Junction 27 allocation.
- 4.26 No party has identified any specific site which, in their view, ought to have been considered.

Conclusions on whether the ‘sequential test’ has been approached with sufficient rigour

- 4.27 It is common ground that the sequential test has been approached with sufficient rigour and, therefore, the conclusion drawn that there are no sites sequentially preferable to the allocation site, is robust.

APPENDIX A: UPDATED RETAIL ASSESSMENT

Methodology

The CBRE retail assessment has been updated and modified to address the issues and questions raised by the Inspector. An updated retail need and impact assessment follows a step-by-step approach, as below:

- 1 definition of an appropriate design year, price base and study area;
- 2 an assessment of population and available comparison goods expenditure within the study area;
- 3 an assessment of shopping patterns based on CBRE's market shares;
- 4 a comparison goods turnover estimate for the proposed DOV and retail commitments;
- 5 estimates of the trade draw of the proposed DOV and retail commitments; and
- 6 estimates of trade diversion and solus/cumulative impacts on existing town centres.

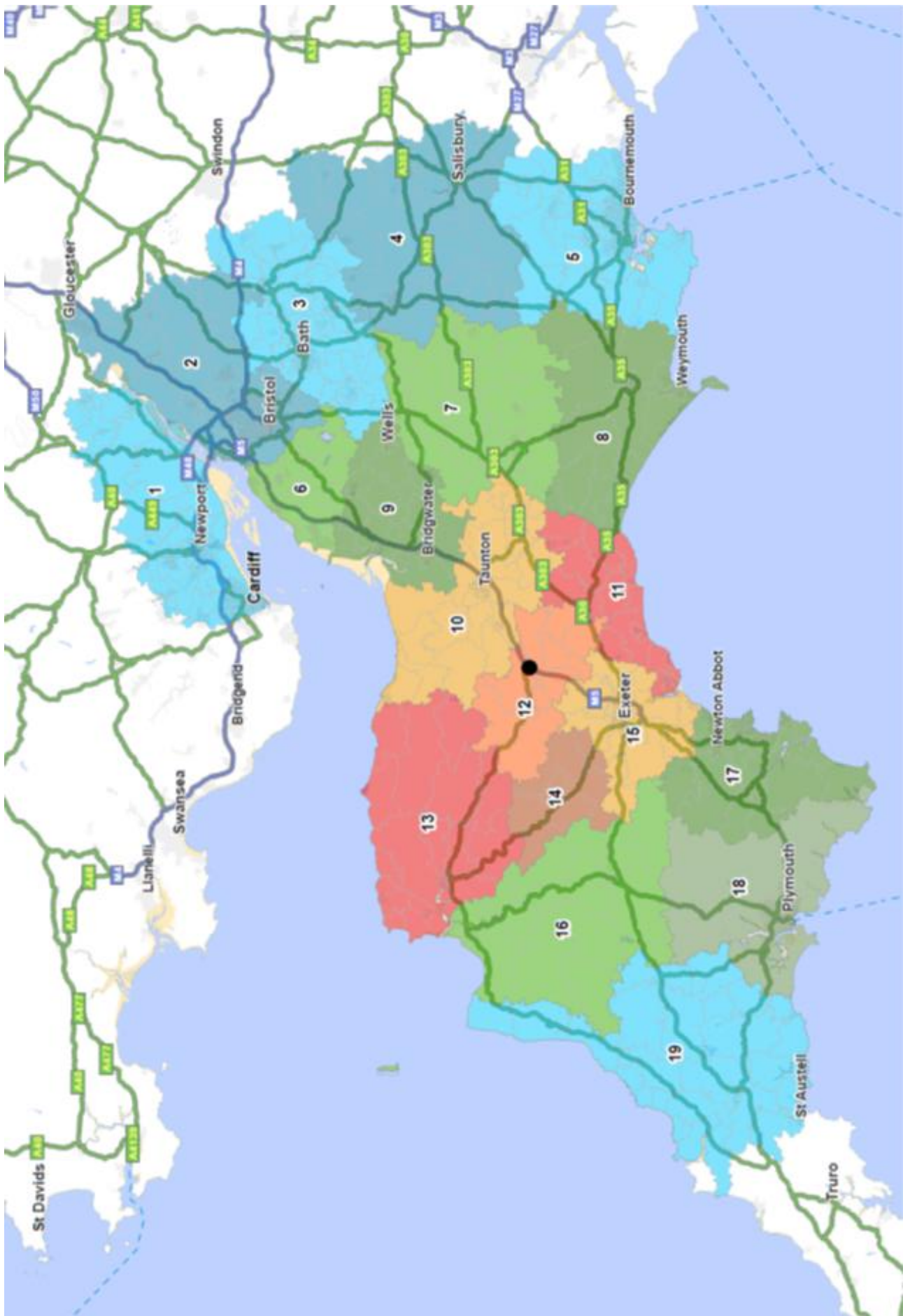
Study area

The updated quantitative analysis is based on the study area and zones adopted in CBRE's Town Centre Uses Statements. The extent of the study area is shown overleaf. The study area, for the DOV, is divided into a core catchment area (zones 6 to 18) and an outer area (zone 1 to 5 and zone 19). CBRE indicated that the DOV's core catchment approximately equates to a 60-minute drive time area, whilst the outer area equates to a 90-minute drive time area. The assessment for the Food Hall (convenience goods) assessed a smaller catchment area. The core catchment area for comparison goods retail broadly extends to the following local authorities: Plymouth, South Hams, Torbay, Teignbridge, West Devon, Torridge, North Devon, Mid Devon, Exeter, East Devon, West Somerset, Taunton Deane, West Dorset, Weymouth and Portland, South Somerset, Mendip, Sedgemoor and North Somerset.

CBRE anticipates that 80% of the DOV's trade will be drawn from the core catchment and 20% from outside the core catchment. Based on evidence from similar designer outlet villages across the country this trade draw assumption is reasonable. For example, the catchment areas adopted for the impact assessments of similar designer outlet schemes recently approved at Tewkesbury and Grantham was 60-minute drive areas. The updated impact assessment assumes the proposed DOV will attract most of its trade (80%) from the core catchment area, which is consistent with assumptions made at Grantham and Tewkesbury.

Population and expenditure

CBRE adopted population/expenditure data provided by Experian (October 2014). Experian's latest data has been obtained as shown in Tables 1, 2A and 2B in this Appendix. Experian's national expenditure information (Experian Retail Planner Briefing Note 15, December 2017) has been used to forecast expenditure within the study area to 2025 and beyond, and to re-estimate expenditure at the 2014 base year. Special Forms of Trading (SFT) or non-store activity has been deduced based on Experian's recommended adjusted SFT projections. Total comparison and convenience goods expenditure is shown in Tables 3A and 3B.



Price base, base year, current year, design year and horizon years

All monetary values are expressed at 2016 prices, consistent with Experian's most up to date information.

The original base year adopted is consistent with the household shopper survey undertaken in 2014. Base year shopping patterns have been projected forward to the current year (2018) based on constant market shares. CBRE adopted 2024 as the design year. To reflect delays, the design year has been rolled forward to 2025 in this assessment.

The NPPF (paragraph 26) indicates that in relation to planning applications for retail/leisure development, the impact on town centres should be assessed "up to five years from the time the application is made." The NPPF goes on to indicate that "for major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made." This NPPF guidance relates to the determination of planning applications rather than the allocation of sites through the plan making process. Development plans are required to allocate a range of suitable sites to meet the need in full for main town centre uses over the plan period, rather than just five years. The need/impact analysis for plan allocations must assess longer-term projections than those normally required to assess planning applications.

The 2025 design year assumes the DOV development is unlikely to be completed before 2023, whilst allowing two years post completion to achieve full and settled trading. Allowing time for the Local Plan adoption and a detailed planning application to be prepared and determined, construction of the development is unlikely to commence before 2020/21. Allowing 3 years for construction, fit-out and completion in 2023, the earliest appropriate design year for the impact assessment is 2025. To assess the implications for development plan retail allocations within the core catchment area, it is necessary to consider trading levels in the longer term. Retail capacity figures have been produced for two horizon years at 2029 and 2033.

Market shares and base year trading

To re-assess base year trading levels, CBRE's market shares have been adjusted to exclude home shopping/ SFT. The turnovers of existing centres/facilities have been recalculated based on the adjusted market shares and updated expenditure figures. Comparison goods market shares at 2014 (the time of the household survey) are shown in Table 4.

Completions/commitments

The CBRE original 2014 market shares will not reflect the implementation of commitments between 2014 and 2018, or the implications of commitments completed in the future. A list of comparison goods commitments (completed and unimplemented) and their estimated turnovers are shown in Table 10A and 10B. Adjusted comparison goods shopping patterns at 2025 with all commitments implemented are shown in Table 5.

The trade draw of commitments is based on the trade draw patterns of existing retail facilities within each zone, derived from the household survey i.e. a proposed development within a specific zone is expected to have a similar trade draw to existing facilities within that zone on a pro-rata basis. The trade diversion from each centre/destination to commitments is calculated within each zone based on the proportion of trade attracted to each destination from the zone. This apportionment is applied on a pro-rata basis but a weighting has been applied for comparison goods

shopping, i.e. a low weight for smaller, more local centres that are less likely to compete directly with commitments, and a higher weight for larger destinations that are more likely to compete directly with commitments.

DOV comparison goods turnover and trade draw

The amount floorspace proposed in the DOV is 15,793 sq.m gross (170,000 sq.ft), of which a maximum of 13,935 sq.m gross (150,000 sq.ft) is expected to be occupied by Class A1 comparison goods retail. The remainder (1,858 sq.m) is expected to be occupied by Class A3 food and beverage. A net sales to gross ratio of 80% has been adopted to calculate the net sales floorspace. The maximum comparison goods sales floorspace is 11,148 sq.m net. This 80% net sales to gross ratio is higher (more robust) than the figures adopted for other recent designer outlet schemes i.e. 75% adopted in Grantham, 77% adopted in Tewkesbury and 70% adopted at Scotch Corner. The net sales to gross ratio and average sales densities at designer outlet centres in the UK is now typically around 75% and £5,000 per sq.m net sales respectively. For robustness a higher 80% net sales to gross ratio and a turnover density of £6,000 per sq.m net sales has been adopted. The comparison goods turnover and trade draw of the DOV is £66.89 million at 2025, as shown in Table 13. As indicated above, this trade draw assumes 80% of the DOV's turnover will come from the core catchment area.

Food Hall convenience goods turnover

The proposed Food Hall is 2,790 sq.m gross (30,000 sq.ft), which will include Class A1 food and grocery uses and Class A3 uses. Up to a third (930 sq.m) will be occupied by Class A1 sales. A net to gross ratio of 80% has been adopted to calculate the net sales floorspace. The maximum convenience goods sales floorspace is 744 sq.m net. For robustness a turnover density of £10,000 per sq.m net sales has been adopted. The convenience goods turnover of the Food Hall is £7.44 million.

Updated Quantitative Retail Tables

Table 1: Study Area Population

| Zone | 2014 | 2018 | 2025 | 2029 | 2033 |
|------------------------------------|------------------|------------------|------------------|------------------|------------------|
| Core Catchment | | | | | |
| Zone 6 - Weston S-M | 205,737 | 214,003 | 227,425 | 234,823 | 241,496 |
| Zone 7 - Yeovil | 201,696 | 207,244 | 215,519 | 219,877 | 223,859 |
| Zone 8 - Dorchester/Weymouth | 160,385 | 163,237 | 168,447 | 171,296 | 173,855 |
| Zone 9 - Bridgewater | 156,322 | 163,237 | 172,980 | 177,969 | 182,378 |
| Zone 10 - Taunton | 174,865 | 180,500 | 188,434 | 192,660 | 196,522 |
| Zone 11 - Exmouth/Sidmouth/Honiton | 134,331 | 138,325 | 145,053 | 148,757 | 152,014 |
| Zone 12 - Cullompton/Tiverton | 61,997 | 64,084 | 66,969 | 68,409 | 69,718 |
| Zone 13 - Barnstaple | 101,266 | 102,883 | 105,642 | 107,252 | 108,709 |
| Zone 14 - Crediton | 23,105 | 23,790 | 24,806 | 25,368 | 25,798 |
| Zone 15 - Exeter | 185,910 | 197,509 | 206,662 | 212,559 | 217,436 |
| Zone 16 - Bideford/Okehampton | 90,853 | 94,112 | 99,387 | 102,104 | 104,450 |
| Zone 17 - Torquay/Newton Abbott | 262,780 | 269,683 | 280,468 | 286,533 | 291,953 |
| Zone 18 - Plymouth | 380,221 | 389,169 | 400,899 | 408,627 | 415,165 |
| Outside Core Catchment | | | | | |
| Zone 1 - Cardiff/Newport | 674,875 | 692,794 | 719,009 | 733,867 | 747,226 |
| Zone 2 - Bristol | 982,256 | 1,027,619 | 1,089,317 | 1,123,621 | 1,155,181 |
| Zone 3 - Bath | 391,280 | 407,248 | 421,879 | 430,799 | 438,254 |
| Zone 4 - South Wiltshire | 205,306 | 213,245 | 220,697 | 224,228 | 227,488 |
| Zone 5 - Bournemouth/Poole | 579,188 | 600,146 | 631,912 | 650,198 | 666,544 |
| Zone 19 - Cornwall | 186,212 | 192,218 | 202,116 | 207,509 | 212,252 |
| Total | 5,158,585 | 5,341,046 | 5,587,621 | 5,726,456 | 5,850,298 |

Sources:

Experian Population Projections - December 2017

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

| Zone | 2014 | 2018 | 2025 | 2029 | 2033 |
|------------------------------------|-------|-------|-------|-------|-------|
| Core Catchment | | | | | |
| Zone 6 - Weston S-M | 2,161 | 2,124 | 2,108 | 2,108 | 2,110 |
| Zone 7 - Yeovil | 2,159 | 2,122 | 2,106 | 2,106 | 2,108 |
| Zone 8 - Dorchester/Weymouth | 2,183 | 2,145 | 2,129 | 2,129 | 2,131 |
| Zone 9 - Bridgewater | 2,091 | 2,055 | 2,040 | 2,039 | 2,041 |
| Zone 10 - Taunton | 2,142 | 2,105 | 2,089 | 2,089 | 2,090 |
| Zone 11 - Exmouth/Sidmouth/Honiton | 2,175 | 2,137 | 2,122 | 2,121 | 2,123 |
| Zone 12 - Cullompton/Tiverton | 2,108 | 2,071 | 2,056 | 2,055 | 2,057 |
| Zone 13 - Barnstaple | 2,147 | 2,110 | 2,094 | 2,093 | 2,095 |
| Zone 14 - Crediton | 2,200 | 2,162 | 2,146 | 2,146 | 2,148 |
| Zone 15 - Exeter | 2,035 | 2,000 | 1,985 | 1,985 | 1,987 |
| Zone 16 - Bideford/Okehampton | 2,188 | 2,150 | 2,134 | 2,133 | 2,135 |
| Zone 17 - Torquay/Newton Abbott | 2,120 | 2,084 | 2,068 | 2,068 | 2,069 |
| Zone 18 - Plymouth | 2,015 | 1,980 | 1,965 | 1,965 | 1,966 |
| Outside Core Catchment | | | | | |
| Zone 1 - Cardiff/Newport | 1,899 | 1,866 | 1,852 | 1,851 | 1,853 |
| Zone 2 - Bristol | 1,978 | 1,943 | 1,929 | 1,929 | 1,930 |
| Zone 3 - Bath | 2,044 | 2,009 | 1,994 | 1,993 | 1,995 |
| Zone 4 - South Wiltshire | 2,112 | 2,076 | 2,061 | 2,060 | 2,062 |
| Zone 5 - Bournemouth/Poole | 2,101 | 2,064 | 2,049 | 2,049 | 2,050 |
| Zone 19 - Cornwall | 2,137 | 2,100 | 2,084 | 2,084 | 2,086 |

Experian local estimates for 2016 convenience goods expenditure per capita (2016 prices)

Growth Rates: 2014-18 = -0.6%; 2018-19 = -0.2% and 0.1% p.a. beyond 2019

Excludes Special Forms of Trading - Experian adjusted deductions

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

| Zone | 2014 | 2018 | 2025 | 2029 | 2033 |
|------------------------------------|-------|-------|-------|-------|-------|
| Core Catchment | | | | | |
| Zone 6 - Weston S-M | 2,161 | 2,124 | 2,108 | 2,108 | 2,110 |
| Zone 7 - Yeovil | 2,159 | 2,122 | 2,106 | 2,106 | 2,108 |
| Zone 8 - Dorchester/Weymouth | 2,183 | 2,145 | 2,129 | 2,129 | 2,131 |
| Zone 9 - Bridgewater | 2,091 | 2,055 | 2,040 | 2,039 | 2,041 |
| Zone 10 - Taunton | 2,142 | 2,105 | 2,089 | 2,089 | 2,090 |
| Zone 11 - Exmouth/Sidmouth/Honiton | 2,175 | 2,137 | 2,122 | 2,121 | 2,123 |
| Zone 12 - Cullompton/Tiverton | 2,108 | 2,071 | 2,056 | 2,055 | 2,057 |
| Zone 13 - Barnstable | 2,147 | 2,110 | 2,094 | 2,093 | 2,095 |
| Zone 14 - Crediton | 2,200 | 2,162 | 2,146 | 2,146 | 2,148 |
| Zone 15 - Exeter | 2,035 | 2,000 | 1,985 | 1,985 | 1,987 |
| Zone 16 - Bideford/Okehampton | 2,188 | 2,150 | 2,134 | 2,133 | 2,135 |
| Zone 17 - Torquay/Newton Abbott | 2,120 | 2,084 | 2,068 | 2,068 | 2,069 |
| Zone 18 - Plymouth | 2,015 | 1,980 | 1,965 | 1,965 | 1,966 |
| Outside Core Catchment | | | | | |
| Zone 1 - Cardiff/Newport | 1,899 | 1,866 | 1,852 | 1,851 | 1,853 |
| Zone 2 - Bristol | 1,978 | 1,943 | 1,929 | 1,929 | 1,930 |
| Zone 3 - Bath | 2,044 | 2,009 | 1,994 | 1,993 | 1,995 |
| Zone 4 - South Wiltshire | 2,112 | 2,076 | 2,061 | 2,060 | 2,062 |
| Zone 5 - Bournemouth/Poole | 2,101 | 2,064 | 2,049 | 2,049 | 2,050 |
| Zone 19 - Cornwall | 2,137 | 2,100 | 2,084 | 2,084 | 2,086 |

Experian local estimates for 2016 convenience goods expenditure per capita (2016 prices)

Growth Rates: 2014-18 = -0.6%; 2018-19 = -0.2% and 0.1% p.a. beyond 2019

Excludes Special Forms of Trading - Experian adjusted deductions

Table 3A: Total Comparison Goods Expenditure (£m)

| Zone | 2014 | 2018 | 2025 | 2029 | 2033 |
|------------------------------------|------------------|------------------|------------------|------------------|------------------|
| Core Catchment | | | | | |
| Zone 6 - Weston S-M | 539.24 | 617.18 | 788.99 | 921.80 | 1,072.68 |
| Zone 7 - Yeovil | 497.79 | 562.87 | 704.00 | 812.70 | 936.24 |
| Zone 8 - Dorchester/Weymouth | 395.19 | 442.54 | 549.35 | 632.12 | 725.94 |
| Zone 9 - Bridgewater | 375.49 | 431.44 | 549.96 | 640.24 | 742.40 |
| Zone 10 - Taunton | 428.94 | 487.35 | 611.96 | 707.98 | 817.15 |
| Zone 11 - Exmouth/Sidmouth/Honiton | 333.14 | 377.63 | 476.26 | 552.66 | 639.03 |
| Zone 12 - Cullompton/Tiverton | 147.37 | 167.64 | 210.74 | 243.58 | 280.89 |
| Zone 13 - Barnstaple | 238.08 | 266.16 | 328.77 | 377.68 | 433.16 |
| Zone 14 - Crediton | 56.51 | 64.04 | 80.33 | 92.95 | 106.96 |
| Zone 15 - Exeter | 448.04 | 523.99 | 659.44 | 767.46 | 888.32 |
| Zone 16 - Bideford/Okehampton | 216.05 | 246.29 | 312.85 | 363.68 | 420.97 |
| Zone 17 - Torquay/Newton Abbott | 639.61 | 722.48 | 903.78 | 1,044.77 | 1,204.54 |
| Zone 18 - Plymouth | 864.24 | 973.70 | 1,206.38 | 1,391.36 | 1,599.55 |
| Outside Core Catchment | | | | | |
| Zone 1 - Cardiff/Newport | 1,535.34 | 1,734.76 | 2,165.14 | 2,500.54 | 2,880.92 |
| Zone 2 - Bristol | 2,282.76 | 2,628.65 | 3,351.18 | 3,911.37 | 4,550.10 |
| Zone 3 - Bath | 964.90 | 1,105.27 | 1,377.19 | 1,591.27 | 1,831.72 |
| Zone 4 - South Wiltshire | 524.56 | 599.64 | 746.41 | 858.09 | 985.07 |
| Zone 5 - Bournemouth/Poole | 1,461.29 | 1,666.61 | 2,110.61 | 2,457.32 | 2,850.41 |
| Zone 19 - Cornwall | 424.75 | 482.66 | 610.33 | 709.03 | 820.62 |
| Total | 12,373.28 | 14,100.90 | 17,743.67 | 20,576.62 | 23,786.65 |

Source: Tables 1 and 2A

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

| Zone | 2014 | 2018 | 2025 | 2029 | 2033 |
|------------------------------------|------------------|------------------|------------------|------------------|------------------|
| Core Catchment | | | | | |
| Zone 6 - Weston S-M | 444.60 | 454.54 | 479.41 | 495.01 | 509.56 |
| Zone 7 - Yeovil | 435.46 | 439.77 | 453.88 | 463.06 | 471.89 |
| Zone 8 - Dorchester/Weymouth | 350.12 | 350.14 | 358.62 | 364.69 | 370.49 |
| Zone 9 - Bridgewater | 326.87 | 335.45 | 352.88 | 362.88 | 372.23 |
| Zone 10 - Taunton | 374.56 | 379.95 | 393.64 | 402.47 | 410.73 |
| Zone 11 - Exmouth/Sidmouth/Honiton | 292.17 | 295.60 | 307.80 | 315.51 | 322.73 |
| Zone 12 - Cullompton/Tiverton | 130.69 | 132.72 | 137.69 | 140.58 | 143.41 |
| Zone 13 - Barnstaple | 217.42 | 217.08 | 221.22 | 224.48 | 227.75 |
| Zone 14 - Crediton | 50.83 | 51.43 | 53.23 | 54.44 | 55.41 |
| Zone 15 - Exeter | 378.33 | 395.02 | 410.22 | 421.93 | 432.05 |
| Zone 16 - Bideford/Okehampton | 198.79 | 202.34 | 212.09 | 217.79 | 223.00 |
| Zone 17 - Torquay/Newton Abbott | 557.09 | 562.02 | 580.01 | 592.55 | 604.05 |
| Zone 18 - Plymouth | 766.15 | 770.55 | 787.77 | 802.95 | 816.21 |
| Outside Core Catchment | | | | | |
| Zone 1 - Cardiff/Newport | 1,281.59 | 1,292.75 | 1,331.60 | 1,358.39 | 1,384.61 |
| Zone 2 - Bristol | 1,942.90 | 1,996.66 | 2,101.29 | 2,167.46 | 2,229.50 |
| Zone 3 - Bath | 799.78 | 818.16 | 841.23 | 858.58 | 874.32 |
| Zone 4 - South Wiltshire | 433.61 | 442.70 | 454.86 | 461.91 | 469.08 |
| Zone 5 - Bournemouth/Poole | 1,216.87 | 1,238.70 | 1,294.79 | 1,332.26 | 1,366.42 |
| Zone 19 - Cornwall | 397.94 | 403.66 | 421.21 | 432.45 | 442.76 |
| Total | 10,595.75 | 10,779.26 | 11,193.44 | 11,469.38 | 11,726.19 |

Source: Tables 1 and 2B

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

| Table 4: Base Year 2014 Comparison Goods Market Shares (%) | | | | | | | | | | | | | | | | | | | | | | |
|--|----------------------------|-------|-------|-------|-------|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|
| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | |
| Core Catchment | Portishead | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Weston-super-mare | 0.0% | 0.1% | 0.5% | 0.0% | 0.0% | 43.9% | 0.1% | 0.0% | 13.4% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.0% | |
| | Other zone 6 | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 8.3% | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Frome | 0.0% | 0.0% | 4.1% | 1.3% | 0.0% | 0.0% | 2.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Shepton Mallet | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 3.7% | 0.0% | 2.5% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Yeovil | 0.0% | 0.0% | 0.2% | 0.9% | 0.1% | 0.0% | 55.1% | 9.7% | 2.4% | 12.9% | 3.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Other zone 7 | 0.0% | 0.0% | 0.0% | 0.3% | 0.1% | 0.0% | 11.6% | 0.8% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | |
| | Bridport | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 9.7% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Dorchester | 0.0% | 0.0% | 0.0% | 0.0% | 2.0% | 0.0% | 1.0% | 32.2% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Weymouth | 0.0% | 0.0% | 0.0% | 0.4% | 0.7% | 0.0% | 0.0% | 25.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.0% |
| | Other zone 8 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Bridgwater | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 16.7% | 2.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Street | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 2.9% | 0.0% | 6.8% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Wells | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.4% | 0.0% | 6.2% | 0.0% | 0.1% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Clarks Village, Street | 0.0% | 0.1% | 0.3% | 0.4% | 0.0% | 0.3% | 2.1% | 0.1% | 4.0% | 1.2% | 0.1% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.1% | 0.3% | 0.0% | 5.0% | 0.0% |
| | Other zone 9 | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.7% | 0.9% | 0.0% | 11.2% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Minehead | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 2.4% | 0.0% | 0.0% | 0.0% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| | Taunton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 1.8% | 0.0% | 17.7% | 64.2% | 10.4% | 9.5% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| | Other zone 10 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.1% | 6.8% | 0.1% | 0.5% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Chard | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 6.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Exmouth | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.3% | 0.3% | 0.0% | 0.3% | 0.0% | 0.3% | 0.7% | 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% | 7.1% | 8.2% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Sidmouth | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 6.8% | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| | Other zone 11 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.3% | 0.0% | 0.3% | 10.1% | 1.1% | 0.0% | 0.0% | 0.5% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Cullompton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 3.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| | Tiverton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.5% | 26.7% | 1.0% | 1.7% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Other zone 12 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.3% | 0.2% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Barnstaple | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.8% | 79.5% | 11.4% | 0.0% | 40.4% | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% |
| | Ilfracombe | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Brantcumbe | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | South Molton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.1% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Other zone 13 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Chulmeigh | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Credton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 26.2% | 0.3% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Other zone 14 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Exeter | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 4.3% | 39.4% | 45.1% | 8.9% | 55.9% | 83.3% | 22.3% | 11.0% | 1.2% | 1.8% | 5.0% | 0.0% |
| | Other zone 15 | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.1% | 6.2% | 0.5% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Bideford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.5% | 0.3% | 12.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Hoisworthy | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.2% | 0.0% | 4.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Okehampton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 3.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Atlantic Village, Bideford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.3% | 50.0% | 0.0% |
| | Other zone 16 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.7% | 0.4% | 0.0% | 5.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Dartmouth | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Newton Abbott | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.5% | 0.1% | 0.0% | 0.0% | 4.5% | 0.3% | 32.4% | 0.8% | 0.0% | 0.0% | 0.0% |
| | Torquay | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.3% | 0.2% | 0.0% | 0.0% | 0.8% | 0.0% | 30.1% | 0.5% | 0.0% | 5.0% | 0.0% |
| | Other zone 17 | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.1% | 0.0% | 0.1% | 15.0% | 0.3% | 0.0% | 0.0% | 0.0% |
| | Ivybridge | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.3% | 0.0% | 0.0% | 0.0% |
| | Kingsbridge | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 1.7% | 0.0% | 0.0% | 0.0% |
| Plymouth | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% | 0.0% | 0.0% | 0.2% | 2.8% | 4.8% | 75.5% | 25.7% | 10.0% | 0.0% | |
| Tavistock | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.8% | 5.0% | 0.0% | 0.0% | |
| Other zone 18 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.3% | 4.4% | 0.0% | 0.0% | |
| Sub-Total | | 0.0% | 1.7% | 5.9% | 3.3% | 3.5% | 58.0% | 83.0% | 79.7% | 82.4% | 96.1% | 95.1% | 99.3% | 99.4% | 99.2% | 98.3% | 93.9% | 98.2% | 95.6% | 29.6% | | |
| Outside Area | Caerphilly | 3.7% | 0.0% | 0.0% | 3.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% | |
| | Cardiff | 30.9% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.3% | 40.0% | |
| | Cwmbran | 13.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Monmouth | 2.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Newport | 23.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Other zone 1 | 9.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Bristolington | 0.0% | 2.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Bristol | 1.4% | 40.3% | 7.5% | 1.1% | 0.0% | 14.1% | 2.8% | 0.1% | 6.6% | 1.5% | 4.3% | 0.0% | 0.0% | 0.2% | 0.5% | 0.0% | 0.3% | 0.1% | 0.1% | 5.0% | |
| | Stroud | 0.0% | 3.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Yate | 0.0% | 4.5% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Cribbs Causeway, Bristol | 2.1% | 28.7% | 2.6% | 0.6% | 0.0% | 26.4% | 0.1% | 0.0% | 7.2% | 1.8% | 0.1% | 0.0% | 0.1% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% | |
| | Retail parks, Gloucester | 0.5% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 60.0% | |
| | Other zone 2 | 0.2% | 4.6% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Bath | 0.0% | 4.6% | 20.8% | 9.9% | 0.0% | 0.2% | 3.3% | 1.6% | 0.9% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.0% | |
| | Chippenham | 0.0% | 0.7% | 24.3% | 0.2% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Devizes | 0.0% | 0.0% | 1.1% | 5.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| | Trowbridge | 0.0% | 0.0% | 16.5% | 14.5% | 0.0% | 0.0% | | | | | | | | | | | | | | | |

Source: NEMS Household Survey September 2014

Table 5: Base Year 2014 Comparison Goods Trading Patterns (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|-------------|----------------------------|----------|----------|--------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|-----------|
| Expenditure | | 1,535.34 | 2,282.76 | 964.90 | 524.56 | 1,461.29 | 539.24 | 497.79 | 395.19 | 375.49 | 428.94 | 333.14 | 147.37 | 238.08 | 56.51 | 448.04 | 216.05 | 639.61 | 864.24 | 424.75 | | 12,373.28 |
| Core | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.46 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.46 |
| Catchment | Weston-super-mare | 0.00 | 2.55 | 4.82 | 0.00 | 0.00 | 236.96 | 0.72 | 0.00 | 50.50 | 0.47 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.89 | 328.92 |
| | Other zone 6 | 0.00 | 18.69 | 0.00 | 0.00 | 0.00 | 44.80 | 0.00 | 0.00 | 4.68 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 68.17 |
| | Frome | 0.00 | 0.00 | 39.56 | 6.74 | 0.00 | 0.00 | 12.68 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 58.98 |
| | Shepton Mallet | 0.00 | 0.00 | 0.96 | 0.00 | 0.00 | 0.00 | 18.23 | 0.00 | 9.55 | 0.00 | 0.43 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 29.18 |
| | Yeovil | 0.00 | 0.00 | 1.93 | 4.52 | 1.46 | 0.00 | 274.22 | 38.34 | 8.96 | 55.31 | 12.03 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 396.77 |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 1.35 | 1.46 | 0.00 | 57.51 | 3.35 | 0.00 | 0.53 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.85 | 0.00 | 65.05 |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 38.19 | 0.00 | 0.00 | 0.82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 39.01 |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 29.23 | 0.00 | 5.16 | 127.29 | 0.00 | 0.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 162.42 |
| | Weymouth | 0.00 | 0.00 | 0.00 | 2.02 | 10.23 | 0.00 | 0.00 | 101.86 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 12.68 | 126.80 |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.58 | 0.00 | 0.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.00 |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 62.70 | 8.77 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 71.81 |
| | Street | 0.00 | 0.00 | 2.89 | 0.00 | 0.00 | 0.00 | 14.31 | 0.00 | 25.69 | 0.26 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 43.16 |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.18 | 1.83 | 0.00 | 23.33 | 0.00 | 0.26 | 0.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 28.00 |
| | Clarks Village, Street | 0.00 | 1.42 | 2.89 | 2.09 | 0.00 | 1.38 | 10.33 | 0.25 | 14.86 | 5.04 | 0.30 | 0.00 | 0.00 | 0.24 | 0.00 | 0.00 | 0.34 | 2.59 | 0.00 | 2.20 | 43.93 |
| | Other zone 9 | 0.00 | 3.11 | 0.00 | 0.00 | 0.00 | 3.56 | 4.64 | 0.00 | 41.93 | 1.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 54.67 |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.38 | 0.00 | 0.00 | 0.00 | 10.19 | 0.00 | 0.00 | 3.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.79 | 15.76 |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.05 | 8.95 | 0.00 | 66.44 | 275.40 | 34.49 | 13.95 | 3.25 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 21.34 | 426.89 |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.18 | 0.00 | 0.54 | 29.21 | 0.43 | 0.67 | 0.00 | 0.04 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.06 |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.15 | 20.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.15 |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.45 | 0.42 | 0.00 | 0.19 | 3.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 28.40 |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 23.67 | 12.09 | 0.00 | 0.00 | 0.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.50 |
| | Sidmouth | 0.00 | 0.00 | 3.86 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22.55 | 2.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.51 | 30.24 |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.46 | 1.18 | 0.00 | 1.16 | 33.76 | 1.65 | 0.00 | 0.00 | 2.34 | 0.50 | 0.00 | 0.00 | 0.00 | 0.00 | 41.03 |
| | Cullompton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.16 | 5.50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.42 | 0.00 | 8.08 |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.26 | 1.68 | 39.33 | 2.47 | 0.93 | 3.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 48.02 |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.43 | 0.06 | 0.13 | 0.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.94 |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.15 | 1.21 | 189.28 | 6.43 | 0.00 | 87.20 | 0.00 | 0.00 | 4.25 | 0.00 | 291.51 |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.87 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.87 |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.74 |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.96 | 0.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.16 |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.34 |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.75 | 0.16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.91 |
| | Crediton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 14.80 | 1.17 | 0.73 | 0.00 | 0.00 | 0.00 | 0.00 | 16.70 |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.08 | 0.00 | 0.29 | 0.00 | 0.00 | 0.00 | 0.00 | 0.38 |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.01 | 0.00 | 0.00 | 18.59 | 131.15 | 66.41 | 21.09 | 31.58 | 373.36 | 48.28 | 70.39 | 10.37 | 7.65 | 41.15 | 823.04 |
| | Other zone 15 | 0.00 | 4.25 | 0.00 | 0.00 | 0.00 | 2.04 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.89 | 0.00 | 0.04 | 27.87 | 1.14 | 0.34 | 0.00 | 0.00 | 0.00 | 36.56 |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.19 | 0.27 | 1.38 | 26.57 | 0.00 | 0.00 | 0.00 | 0.00 | 28.40 |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.40 | 0.00 | 0.11 | 0.00 | 9.48 | 0.00 | 0.00 | 0.00 | 0.00 | 9.98 |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.91 | 6.47 | 0.00 | 0.00 | 0.00 | 0.00 | 8.38 |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.37 | 0.00 | 0.00 | 1.46 | 0.00 | 0.00 | 1.27 | 4.11 | 8.22 |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.18 | 1.65 | 0.22 | 0.00 | 11.12 | 0.00 | 0.00 | 0.00 | 0.00 | 13.18 |
| | Dartmouth | 0.00 | 6.23 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 19.46 | 0.00 | 0.00 | 0.00 | 25.69 |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.42 | 1.72 | 0.22 | 0.00 | 0.00 | 19.96 | 0.64 | 207.14 | 6.91 | 0.00 | 0.00 | 237.02 |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.30 | 0.00 | 0.95 | 0.25 | 0.00 | 0.00 | 3.56 | 0.00 | 192.83 | 4.32 | 0.00 | 10.64 | 212.84 |
| | Other zone 17 | 0.00 | 1.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.16 | 0.00 | 0.00 | 0.08 | 0.00 | 0.18 | 96.03 | 2.59 | 0.00 | 0.00 | 101.74 |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 19.88 | 0.00 | 0.00 | 19.88 |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.09 | 14.69 | 0.00 | 0.00 | 23.78 |
| | Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 8.77 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.77 | 0.00 | 0.00 | 0.00 | 0.96 | 5.9 | | | | | |

Table 6: Comparison Goods Trading Patterns 2018 - Constant Market Shares (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total | |
|---------------|----------------------------|----------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|----------|-----------|-------|
| Expenditure | | 1,734.76 | 2,628.65 | 1,105.27 | 599.64 | 1,666.61 | 617.18 | 562.87 | 442.54 | 431.44 | 487.35 | 377.63 | 167.64 | 266.16 | 64.04 | 523.99 | 246.29 | 722.48 | 973.70 | 482.66 | | 14,100.90 | |
| Core | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 19.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 19.98 | |
| Catchment | Weston-super-mare | 0.00 | 2.93 | 5.53 | 0.00 | 0.00 | 271.21 | 0.81 | 0.00 | 58.02 | 0.54 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 37.67 | 376.72 | |
| | Other zone 6 | 0.00 | 21.52 | 0.00 | 0.00 | 0.00 | 51.28 | 0.00 | 0.00 | 5.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 78.17 | |
| | Frome | 0.00 | 0.00 | 45.32 | 7.71 | 0.00 | 0.00 | 14.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 67.36 | |
| | Shepton Mallet | 0.00 | 0.00 | 1.11 | 0.00 | 0.00 | 0.00 | 20.62 | 0.00 | 10.97 | 0.00 | 0.49 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.18 | |
| | Yeovil | 0.00 | 0.00 | 2.21 | 5.16 | 1.67 | 0.00 | 310.07 | 42.93 | 10.29 | 62.84 | 13.64 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 448.82 | |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 1.54 | 1.67 | 0.00 | 65.03 | 3.75 | 0.00 | 0.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.97 | 0.00 | 73.55 | |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 42.77 | 0.00 | 0.00 | 0.93 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 43.70 | |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 33.33 | 0.00 | 5.84 | 142.55 | 0.00 | 0.84 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 182.55 | |
| | Weymouth | 0.00 | 0.00 | 0.00 | 2.31 | 11.67 | 0.00 | 0.00 | 114.07 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 142.28 | |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.13 | 0.00 | 0.48 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.61 | |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.39 | 0.00 | 0.00 | 0.00 | 0.00 | 72.05 | 9.97 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 82.40 | |
| | Street | 0.00 | 0.00 | 3.32 | 0.00 | 0.00 | 0.00 | 16.18 | 0.00 | 29.52 | 0.30 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 49.32 | |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.50 | 2.07 | 0.00 | 26.81 | 0.00 | 0.29 | 0.45 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.12 | |
| | Clarks Village, Street | 0.00 | 1.63 | 3.32 | 2.39 | 0.00 | 1.58 | 11.68 | 0.28 | 17.08 | 5.73 | 0.34 | 0.00 | 0.00 | 0.00 | 0.27 | 0.00 | 0.00 | 0.39 | 2.92 | 0.00 | 2.51 | 50.10 |
| | Other zone 9 | 0.00 | 3.59 | 0.00 | 0.00 | 0.00 | 4.08 | 5.25 | 0.00 | 48.18 | 1.61 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 62.71 |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.58 | 0.00 | 0.00 | 0.00 | 11.58 | 0.00 | 0.00 | 3.80 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.89 | 17.85 | |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.50 | 10.12 | 0.00 | 76.35 | 312.90 | 39.10 | 15.87 | 3.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.29 | 485.76 | |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.33 | 0.00 | 0.62 | 33.18 | 0.49 | 0.76 | 0.00 | 0.04 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.42 |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.71 | 22.68 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.39 |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.71 | 0.47 | 0.00 | 0.21 | 3.91 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.31 |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 26.83 | 13.75 | 0.00 | 0.00 | 0.87 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 41.45 |
| | Sidmouth | 0.00 | 0.00 | 4.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.56 | 2.84 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.72 | 34.33 | |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.52 | 1.32 | 0.00 | 1.31 | 38.27 | 1.87 | 0.00 | 0.00 | 2.73 | 0.57 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.59 |
| | Cullompton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.44 | 6.26 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.48 | 0.00 | 9.19 | |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.30 | 1.91 | 44.74 | 2.76 | 1.06 | 3.91 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 54.67 |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.49 | 0.07 | 0.14 | 0.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.08 | |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.57 | 1.38 | 211.60 | 7.28 | 0.00 | 99.41 | 0.00 | 0.00 | 4.83 | 0.00 | 328.07 | |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.33 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.33 | |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.19 | |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.55 | 0.22 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.77 | |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.50 | |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.85 | 0.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.04 | |
| | Crediton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 16.77 | 1.37 | 0.83 | 0.00 | 0.00 | 0.00 | 0.00 | 18.97 | |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.10 | 0.00 | 0.33 | 0.00 | 0.00 | 0.00 | 0.00 | 0.43 | |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.40 | 0.00 | 0.00 | 21.13 | 148.67 | 75.54 | 23.58 | 35.79 | 436.65 | 55.04 | 79.51 | 11.68 | 8.69 | 47.35 | 947.03 | |
| | Other zone 15 | 0.00 | 4.89 | 0.00 | 0.00 | 0.00 | 2.33 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.01 | 0.00 | 0.05 | 32.59 | 1.30 | 0.39 | 0.00 | 0.00 | 0.00 | 42.56 | |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.21 | 0.30 | 1.61 | 30.29 | 0.00 | 0.00 | 0.00 | 32.42 | |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.45 | 0.00 | 0.12 | 0.00 | 10.81 | 0.00 | 0.00 | 0.00 | 0.00 | 11.38 | |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.23 | 7.37 | 0.00 | 0.00 | 0.00 | 0.00 | 9.61 | |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.53 | 0.00 | 0.00 | 1.67 | 0.00 | 0.00 | 1.45 | 4.65 | 9.30 | |
| Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.21 | 1.85 | 0.25 | 0.00 | 12.68 | 0.00 | 0.00 | 0.00 | 0.00 | 14.95 | | |
| Dartmouth | 0.00 | 7.17 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 21.98 | 0.00 | 0.00 | 0.00 | 0.00 | 29.16 | | |
| Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.48 | 1.95 | 0.25 | 0.00 | 0.00 | 23.34 | 0.73 | 233.98 | 7.79 | 0.00 | 0.00 | 268.53 | | |
| Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.34 | 0.00 | 1.08 | 0.29 | 0.00 | 0.00 | 4.16 | 0.00 | 217.81 | 4.87 | 0.00 | 12.03 | 240.57 | | |
| Other zone 17 | 0.00 | 1.96 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.32 | 0.00 | 0.00 | 0.09 | 0.00 | 0.20 | 108.47 | 2.92 | 0.00 | 0.00 | 114.95 | | |
| Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22.40 | 0.00 | 0.00 | 22.40 | | |
| Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 10.27 | 16.55 | 0.00 | 0.00 | 26.82 | | |
| Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 10.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.00 | 0.00 | 0.00 | 0.00 | 1.12 | 6.81 | 34.87 | 735.14 | 124.04 | 101.55 | 1,015.53 | | |
| Tavistock | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.50 | 0.00 | 83.74 | 2.41 | 0.00 | 87.65 | | |
| Other zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.70 | 2.13 | 42.84 | 0.00 | 0.00 | 46.67 | | |
| Sub-Total | Sub-Total | 0.00 | 43.69 | 65.21 | 19.50 | 58.33 | 358.04 | 467.25 | 352.80 | 355.60 | 468.49 | 359.25 | 166.45 | 264.59 | 63.55 | 515.05 | 231.25 | 709.79 | 930.86 | 142.87 | 246.89 | 5,819.46 | |
| Outside | Caerphilly | 64.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.38 | 67.56 | | |
| Catchment | Cardiff | 536.04 | 0.00 | 6.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.27 | 366.09 | 915.24 | | |
| | Cwmbran | 230.72 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 230.72 | | |
| | Monmouth | 46.84 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.84 | | |
| | Newport | 407.67 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 407.67 | | |
| | Other zone 1 | 171.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 171.74 | | |
| | Brislington | 0.00 | 61.62 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | |

Table 7: Comparison Goods Trading Patterns 2025 - Constant Market Shares (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total | |
|----------------|----------------------------|------------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|----------|--------|-----------|----------|
| Expenditure | | 2,165.14 | 3,351.18 | 1,377.19 | 746.41 | 2,110.61 | 788.99 | 704.00 | 549.35 | 549.96 | 611.96 | 476.26 | 210.74 | 328.77 | 80.33 | 659.44 | 312.85 | 903.78 | 1,206.38 | 610.33 | | 17,743.67 | |
| Core Catchment | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.54 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.54 | |
| | Weston-super-mare | 0.00 | 3.74 | 6.89 | 0.00 | 0.00 | 346.71 | 1.02 | 0.00 | 73.96 | 0.67 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 48.11 | 481.10 | |
| | Other zone 6 | 0.00 | 27.43 | 0.00 | 0.00 | 0.00 | 65.55 | 0.00 | 0.00 | 6.85 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 99.84 | |
| | Frome | 0.00 | 0.00 | 56.46 | 9.60 | 0.00 | 0.00 | 17.93 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 83.99 | |
| | Shepton Mallet | 0.00 | 0.00 | 1.38 | 0.00 | 0.00 | 0.00 | 25.79 | 0.00 | 13.99 | 0.00 | 0.62 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 41.77 | |
| | Yeovil | 0.00 | 0.00 | 2.75 | 6.43 | 2.11 | 0.00 | 387.81 | 53.30 | 13.12 | 78.91 | 17.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 561.63 | |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 1.92 | 2.11 | 0.00 | 81.33 | 4.66 | 0.00 | 0.75 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.22 | 0.00 | 91.99 | |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 53.09 | 0.00 | 0.00 | 1.17 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 54.26 | |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 42.21 | 0.00 | 7.30 | 176.95 | 0.00 | 1.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 227.51 | |
| | Weymouth | 0.00 | 0.00 | 0.00 | 2.88 | 14.77 | 0.00 | 0.00 | 141.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.70 | 176.95 | |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.37 | 0.00 | 0.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.97 | |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.48 | 0.00 | 0.00 | 0.00 | 0.00 | 91.84 | 12.51 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 104.84 | |
| | Street | 0.00 | 0.00 | 4.13 | 0.00 | 0.00 | 0.00 | 20.24 | 0.00 | 37.63 | 0.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 62.38 | |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.19 | 2.59 | 0.00 | 34.17 | 0.00 | 0.37 | 0.57 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.89 | |
| | Clarks Village, Street | 0.00 | 2.08 | 4.13 | 2.97 | 0.00 | 2.02 | 14.60 | 0.34 | 21.77 | 7.19 | 0.43 | 0.00 | 0.00 | 0.34 | 0.00 | 0.00 | 0.48 | 3.62 | 0.00 | 3.16 | 63.15 | |
| | Other zone 9 | 0.00 | 4.57 | 0.00 | 0.00 | 0.00 | 5.21 | 6.56 | 0.00 | 61.42 | 2.02 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 79.79 | |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.02 | 0.00 | 0.00 | 0.00 | 14.54 | 0.00 | 0.00 | 4.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.12 | 22.38 | |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.47 | 12.66 | 0.00 | 97.32 | 392.91 | 49.31 | 19.96 | 4.48 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 30.58 | 611.69 | | |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.66 | 0.00 | 0.79 | 41.67 | 0.62 | 0.96 | 0.00 | 0.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.75 | |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.92 | 28.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 34.52 | |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 34.95 | 0.60 | 0.00 | 0.27 | 4.92 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.73 | |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.84 | 17.29 | 0.00 | 0.00 | 1.09 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 52.22 | |
| | Sidmouth | 0.00 | 0.00 | 5.51 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.24 | 3.31 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.16 | 43.22 | |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.65 | 1.64 | 0.00 | 1.65 | 48.26 | 2.36 | 0.00 | 0.00 | 3.44 | 0.72 | 0.00 | 0.00 | 0.00 | 0.00 | 58.71 | |
| | Cullompton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.08 | 7.87 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.61 | 0.00 | 11.56 | |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.37 | 2.40 | 56.24 | 3.40 | 1.33 | 4.92 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 68.67 | |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.62 | 0.09 | 0.18 | 0.47 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.36 | |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.50 | 1.73 | 261.38 | 9.13 | 0.00 | 126.28 | 0.00 | 0.00 | 6.10 | 0.00 | 409.13 | |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.34 | |
| | Illfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.17 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.17 | |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.85 | 0.28 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.13 | |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.85 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.85 | |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.07 | 0.23 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.30 | |
| | Crediton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 21.04 | 1.72 | 1.06 | 0.00 | 0.00 | 0.00 | 0.00 | 23.82 | |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.12 | 0.00 | 0.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.54 | |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.25 | 0.00 | 0.00 | 26.53 | 187.49 | 94.96 | 29.13 | 44.89 | 549.52 | 69.92 | 99.46 | 14.48 | 10.99 | 59.56 | 1,191.18 | |
| | Other zone 15 | 0.00 | 6.24 | 0.00 | 0.00 | 0.00 | 2.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.27 | 0.00 | 0.06 | 41.01 | 1.65 | 0.48 | 0.00 | 0.00 | 0.00 | 53.69 | |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.26 | 0.38 | 2.03 | 38.48 | 0.00 | 0.00 | 0.00 | 0.00 | 41.15 | |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.57 | 0.00 | 0.15 | 0.00 | 13.73 | 0.00 | 0.00 | 0.00 | 0.00 | 14.45 | |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.81 | 9.36 | 0.00 | 0.00 | 0.00 | 0.00 | 12.18 | |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.90 | 0.00 | 0.00 | 2.12 | 0.00 | 1.83 | 5.85 | 11.69 | | |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.26 | 2.28 | 0.32 | 0.00 | 16.10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 18.96 | |
| | Dartmouth | 0.00 | 9.14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.50 | 0.00 | 0.00 | 0.00 | 0.00 | 36.65 | |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.60 | 2.47 | 0.31 | 0.00 | 0.00 | 29.37 | 0.93 | 292.70 | 9.65 | 0.00 | 0.00 | 336.03 | |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.43 | 0.00 | 1.36 | 0.36 | 0.00 | 0.00 | 5.23 | 0.00 | 272.47 | 6.03 | 0.00 | 15.05 | 300.93 | |
| | Other zone 17 | 0.00 | 2.49 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.66 | 0.00 | 0.00 | 0.11 | 0.00 | 0.25 | 135.69 | 3.62 | 0.00 | 0.00 | 143.83 | |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.75 | 0.00 | 0.00 | 27.75 | |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 12.84 | 20.51 | 0.00 | 0.00 | 0.00 | 33.35 | |
| | Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 12.66 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.53 | 0.00 | 0.00 | 0.00 | 1.41 | 8.64 | 43.61 | 910.82 | 156.85 | 126.28 | 1,262.81 | |
| | Tavistock | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.91 | 0.00 | 103.75 | 3.05 | 0.00 | 108.71 | |
| | Other zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.16 | 2.67 | 53.08 | 0.00 | 0.00 | 57.91 | |
| | Sub-Total | Sub-Total | 0.00 | 55.70 | 81.25 | 24.28 | 73.87 | 457.71 | 584.40 | 437.96 | 453.29 | 588.28 | 453.08 | 209.24 | 326.83 | 79.71 | 648.19 | 293.74 | 887.91 | 1,153.30 | 180.66 | 309.56 | 7,298.95 |
| | Outside Catchment | Caerphilly | 80.11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.22 | 84.33 |
| | | Cardiff | 669.03 | 0.00 | 8.26 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 456.98 | 0.25 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.93 | 456.98 | 1,142.45 | |
| Cwmbran | | 287.96 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 287.96 | | |
| Monmouth | | 58.46 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 58.46 | | |
| Newport | | 508.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 508.81 | | |
| Other zone 1 | | 214.35 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 214.35 | | |
| Brislington | | 0.00 | 78.56 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0 | | | | | | | | | |

| | | | | | | | | | | | | | | | | | | | | | | |
|-------|-------|----------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|--------|----------|--------|-----------|-----------|
| TOTAL | TOTAL | 2,165.14 | 3,351.18 | 1,377.19 | 746.41 | 2,110.61 | 788.99 | 703.99 | 549.35 | 549.97 | 611.96 | 476.26 | 210.74 | 328.77 | 80.33 | 659.44 | 312.86 | 903.78 | 1,206.38 | 610.33 | 10,097.83 | 27,841.50 |
|-------|-------|----------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|--------|----------|--------|-----------|-----------|

Table 8: Comparison Goods Trading Patterns 2029 - Constant Market Shares (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|-------------------|----------------------------|----------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|----------|----------|--------|----------|-----------|
| Expenditure | | 2,500.54 | 3,911.37 | 1,591.27 | 858.09 | 2,457.32 | 921.80 | 812.70 | 632.12 | 640.24 | 707.98 | 552.66 | 243.58 | 377.68 | 92.95 | 767.46 | 363.68 | 1,044.77 | 1,391.36 | 709.03 | | 20,576.62 |
| Core Catchment | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 29.84 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 29.84 |
| | Weston-super-mare | 0.00 | 4.37 | 7.96 | 0.00 | 0.00 | 405.08 | 1.17 | 0.00 | 86.10 | 0.78 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56.16 | 561.62 |
| | Other zone 6 | 0.00 | 32.02 | 0.00 | 0.00 | 0.00 | 76.59 | 0.00 | 0.00 | 7.97 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 116.58 |
| | Frome | 0.00 | 0.00 | 65.24 | 11.03 | 0.00 | 0.00 | 20.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 96.97 |
| | Shepton Mallet | 0.00 | 0.00 | 1.59 | 0.00 | 0.00 | 0.00 | 29.77 | 0.00 | 16.28 | 0.00 | 0.72 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 48.36 |
| | Yeovil | 0.00 | 0.00 | 3.18 | 7.39 | 2.46 | 0.00 | 447.69 | 61.33 | 15.27 | 91.29 | 19.95 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 648.57 |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 2.21 | 2.46 | 0.00 | 93.89 | 5.36 | 0.00 | 0.87 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.42 | 0.00 | 106.20 |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 61.09 | 0.00 | 0.00 | 1.36 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 62.45 |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 49.15 | 0.00 | 8.43 | 203.61 | 0.00 | 1.21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 262.40 |
| | Weymouth | 0.00 | 0.00 | 0.00 | 3.31 | 17.20 | 0.00 | 0.00 | 162.94 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20.38 |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.33 | 0.00 | 0.69 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.02 |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.55 | 0.00 | 0.00 | 0.00 | 0.00 | 106.92 | 14.48 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 121.95 |
| | Street | 0.00 | 0.00 | 4.77 | 0.00 | 0.00 | 0.00 | 23.37 | 0.00 | 43.81 | 0.43 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 72.38 |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.73 | 2.99 | 0.00 | 39.78 | 0.00 | 0.43 | 0.66 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47.56 |
| | Clarks Village, Street | 0.00 | 2.43 | 4.77 | 3.42 | 0.00 | 2.36 | 16.86 | 0.39 | 25.34 | 8.32 | 0.50 | 0.00 | 0.39 | 0.00 | 0.00 | 0.56 | 4.17 | 0.00 | 3.66 | 73.19 | |
| | Other zone 9 | 0.00 | 5.34 | 0.00 | 0.00 | 0.00 | 6.09 | 7.58 | 0.00 | 71.50 | 2.34 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 92.85 |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.36 | 0.00 | 0.00 | 0.00 | 16.82 | 0.00 | 0.00 | 5.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.29 | 25.87 |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.22 | 14.62 | 0.00 | 113.30 | 454.56 | 57.22 | 23.07 | 5.15 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 35.43 | 708.55 |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.92 | 0.00 | 0.92 | 48.20 | 0.72 | 1.11 | 0.00 | 0.06 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 52.93 |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.85 | 33.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.04 |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.55 | 0.69 | 0.00 | 0.31 | 5.73 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47.28 |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 39.27 | 19.98 | 0.00 | 0.00 | 1.27 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 60.52 |
| | Sidmouth | 0.00 | 0.00 | 6.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 37.41 | 3.83 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.51 | 50.11 |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.75 | 1.89 | 0.00 | 1.91 | 56.00 | 2.72 | 0.00 | 0.00 | 4.00 | 0.84 | 0.00 | 0.00 | 0.00 | 0.00 | 68.11 |
| | Cullumpton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.58 | 9.09 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.71 | 0.00 | 13.38 |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.43 | 2.79 | 65.01 | 3.91 | 1.53 | 5.73 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 79.40 |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.72 | 0.10 | 0.21 | 0.55 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.57 |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.22 | 2.00 | 300.26 | 10.57 | 0.00 | 146.79 | 0.00 | 0.00 | 7.09 | 0.00 | 0.00 | 471.94 |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.14 | |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.94 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.94 |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.87 | 0.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.19 |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.13 |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.23 | 0.27 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.51 |
| | Crediton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.35 | 2.00 | 1.23 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.58 |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.14 | 0.00 | 0.49 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.63 |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.91 | 0.00 | 0.00 | 30.69 | 217.57 | 109.76 | 33.46 | 51.94 | 639.54 | 81.28 | 114.98 | 16.70 | 12.76 | 69.14 | 1,382.73 |
| | Other zone 15 | 0.00 | 7.28 | 0.00 | 0.00 | 0.00 | 3.48 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.47 | 0.00 | 0.07 | 47.73 | 1.92 | 0.56 | 0.00 | 0.00 | 0.00 | 62.51 |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.30 | 0.44 | 2.36 | 44.73 | 0.00 | 0.00 | 0.00 | 0.00 | 47.83 |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.66 | 0.00 | 0.17 | 0.00 | 15.96 | 0.00 | 0.00 | 0.00 | 0.00 | 16.79 |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.27 | 10.89 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 14.16 |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.18 | 0.00 | 0.00 | 2.46 | 0.00 | 0.00 | 2.13 | 6.77 | 13.54 |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.30 | 2.62 | 0.37 | 0.00 | 18.72 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22.01 |
| | Dartmouth | 0.00 | 10.67 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 31.79 | 0.00 | 0.00 | 0.00 | 42.46 |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.69 | 2.86 | 0.36 | 0.00 | 0.00 | 34.19 | 1.08 | 338.36 | 11.13 | 0.00 | 0.00 | 388.67 |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.50 | 0.00 | 1.57 | 0.42 | 0.00 | 0.00 | 6.09 | 0.00 | 314.97 | 6.96 | 0.00 | 17.40 | 347.91 |
| | Other zone 17 | 0.00 | 2.91 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.93 | 0.00 | 0.13 | 0.00 | 0.30 | 156.86 | 4.17 | 0.00 | 0.00 | 0.00 | 166.29 |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.00 | 0.00 | 0.00 | 32.00 |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 14.85 | 23.65 | 0.00 | 0.00 | 38.50 |
| | Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 14.74 | 0.00 | 0.00 | 0.00 | 0.00 | 2.93 | 0.00 | 0.00 | 0.00 | 1.64 | 10.05 | 50.42 | 1,050.48 | 182.22 | 145.83 | 1,458.31 | |
| | Tavistock | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.22 | 0.00 | 119.66 | 3.55 | 0.00 | 0.00 | 125.42 |
| Other zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.51 | 3.08 | 61.22 | 0.00 | 0.00 | 66.81 | |
| Sub-Total | Sub-Total | 0.00 | 65.01 | 93.89 | 27.91 | 86.01 | 534.76 | 674.63 | 503.94 | 527.70 | 680.58 | 525.76 | 241.85 | 375.45 | 92.23 | 754.37 | 341.46 | 1,026.42 | 1,330.14 | 209.87 | 358.56 | 8,450.57 |
| Outside Catchment | Caerphilly | 92.52 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.87 | 97.39 |
| | Cardiff | 772.67 | 0.00 | 9.55 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.29 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.22 | 527.81 | 1,319.53 | |
| | Cwmbran | 332.57 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 332.57 | |
| | Monmouth | 67.51 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 67.51 | |
| | Newport | 587.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 587.63 | |
| | Other zone 1 | 247.55 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 247.55 | |
| | Brislington | 0.00 | 91.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | |

Table 9: Comparison Goods Trading Patterns 2033 - Constant Market Shares (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total | |
|-------------|----------------------------|--------------|----------|----------|--------|----------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|----------|--------|--------|-----------|--------|
| Expenditure | | 2,880.92 | 4,550.10 | 1,831.72 | 985.07 | 2,850.41 | 1,072.68 | 936.24 | 725.94 | 742.40 | 817.15 | 639.03 | 280.89 | 433.16 | 106.96 | 888.32 | 420.97 | 1,204.54 | 1,599.55 | 820.62 | | 23,786.65 | |
| Core | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 34.72 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 34.72 | |
| | Weston-super-mare | 0.00 | 5.08 | 9.16 | 0.00 | 0.00 | 471.38 | 1.35 | 0.00 | 99.84 | 0.90 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 65.30 | 653.01 | |
| | Other zone 6 | 0.00 | 37.25 | 0.00 | 0.00 | 0.00 | 89.12 | 0.00 | 0.00 | 9.24 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 135.62 | |
| | Frome | 0.00 | 0.00 | 75.10 | 12.66 | 0.00 | 0.00 | 23.85 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 111.61 | |
| | Shepton Mallet | 0.00 | 0.00 | 1.83 | 0.00 | 0.00 | 0.00 | 34.29 | 0.00 | 18.88 | 0.00 | 0.83 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 55.83 | |
| | Yeovil | 0.00 | 0.00 | 3.66 | 8.48 | 2.85 | 0.00 | 515.75 | 70.43 | 17.71 | 105.37 | 23.07 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 747.33 | |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 2.53 | 2.85 | 0.00 | 108.16 | 6.16 | 0.00 | 1.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.64 | 0.00 | 122.35 | |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 70.16 | 0.00 | 0.00 | 1.57 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 71.73 | |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 57.01 | 0.00 | 9.71 | 233.83 | 0.00 | 1.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 301.95 | |
| | Weymouth | 0.00 | 0.00 | 0.00 | 3.80 | 19.95 | 0.00 | 0.00 | 187.12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 23.43 | 234.30 | |
| Catchment | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.42 | 0.00 | 0.80 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.22 | |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.63 | 0.00 | 0.00 | 0.00 | 0.00 | 123.98 | 16.71 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 141.32 | |
| | Street | 0.00 | 0.00 | 5.50 | 0.00 | 0.00 | 0.00 | 26.92 | 0.00 | 50.80 | 0.50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 83.71 | |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.34 | 3.44 | 0.00 | 46.13 | 0.00 | 0.50 | 0.76 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 55.16 | |
| | Clarks Village, Street | 0.00 | 2.82 | 5.50 | 3.93 | 0.00 | 2.75 | 19.42 | 0.45 | 29.39 | 9.61 | 0.58 | 0.00 | 0.00 | 0.45 | 0.00 | 0.00 | 0.65 | 4.80 | 0.00 | 4.23 | 84.56 | |
| | Other zone 9 | 0.00 | 6.21 | 0.00 | 0.00 | 0.00 | 7.09 | 8.73 | 0.00 | 82.91 | 2.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 107.64 | |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.75 | 0.00 | 0.00 | 0.00 | 19.41 | 0.00 | 0.00 | 6.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.49 | 29.84 | |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.08 | 16.84 | 0.00 | 131.37 | 524.65 | 66.16 | 26.60 | 5.90 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.93 | 818.53 | |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.21 | 0.00 | 1.07 | 55.64 | 0.83 | 1.28 | 0.00 | 0.07 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 61.09 | |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.91 | 38.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.28 | |
| Core | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.89 | 0.79 | 0.00 | 0.36 | 6.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 54.67 | |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.40 | 23.05 | 0.00 | 0.00 | 1.47 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 69.92 | |
| | Sidmouth | 0.00 | 0.00 | 7.33 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 43.25 | 4.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.89 | 57.89 | |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.86 | 2.17 | 0.00 | 2.20 | 64.76 | 3.14 | 0.00 | 0.00 | 4.63 | 0.97 | 0.00 | 0.00 | 0.00 | 0.00 | 78.73 | |
| | Cullumpton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.14 | 10.49 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.82 | 0.00 | 15.44 | |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.50 | 3.23 | 74.97 | 4.48 | 1.77 | 6.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 91.57 | |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.83 | 0.11 | 0.24 | 0.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.81 | |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.04 | 2.31 | 344.37 | 12.16 | 0.00 | 169.91 | 0.00 | 0.00 | 8.21 | 0.00 | 543.00 | |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.04 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.04 | |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.81 | |
| Catchment | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.03 | 0.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.40 | |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.44 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.44 | |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.42 | 0.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.74 | |
| | Crediton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 28.01 | 2.32 | 1.43 | 0.00 | 0.00 | 0.00 | 0.00 | 31.75 | |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.16 | 0.00 | 0.57 | 0.00 | 0.00 | 0.00 | 0.00 | 0.73 | |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.65 | 0.00 | 0.00 | 35.42 | 251.58 | 126.58 | 38.38 | 59.77 | 740.25 | 94.08 | 132.56 | 19.19 | 14.77 | 79.91 | 1,598.15 | |
| | Other zone 15 | 0.00 | 8.47 | 0.00 | 0.00 | 0.00 | 4.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.69 | 0.00 | 0.08 | 55.25 | 2.22 | 0.65 | 0.00 | 0.00 | 0.00 | 72.41 | |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.34 | 0.50 | 2.74 | 51.77 | 0.00 | 0.00 | 0.00 | 55.35 | |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.76 | 0.00 | 0.20 | 0.00 | 18.47 | 0.00 | 0.00 | 0.00 | 19.43 | |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.79 | 12.60 | 0.00 | 0.00 | 0.00 | 0.00 | 16.39 | |
| Catchment | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.50 | 0.00 | 0.00 | 2.85 | 0.00 | 0.00 | 2.46 | 7.81 | 15.62 | |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.34 | 3.01 | 0.42 | 0.00 | 21.67 | 0.00 | 0.00 | 0.00 | 0.00 | 25.45 | |
| | Dartmouth | 0.00 | 12.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.65 | 0.00 | 0.00 | 0.00 | 49.07 | |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.80 | 3.31 | 0.41 | 0.00 | 0.00 | 39.57 | 1.25 | 390.10 | 12.80 | 0.00 | 0.00 | 448.24 | |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.58 | 0.00 | 1.82 | 0.48 | 0.00 | 0.00 | 7.05 | 0.00 | 363.14 | 8.00 | 0.00 | 20.06 | 401.13 | |
| | Other zone 17 | 0.00 | 3.39 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.23 | 0.00 | 0.00 | 0.15 | 0.00 | 0.34 | 180.84 | 4.80 | 0.00 | 0.00 | 191.75 | |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.79 | 0.00 | 0.00 | 36.79 | |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.12 | 27.19 | 0.00 | 0.00 | 44.31 | |
| | Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 17.10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.39 | 0.00 | 0.00 | 0.00 | 1.89 | 11.63 | 58.13 | 1,207.66 | 210.90 | 167.86 | 1,678.56 | |
| | Tavistock | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.57 | 0.00 | 137.56 | 4.10 | 0.00 | 144.23 | |
| Catchment | Other zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.91 | 3.55 | 70.38 | 0.00 | 0.00 | 76.84 | |
| | Sub-Total | 0.00 | 75.63 | 108.07 | 32.04 | 99.76 | 622.28 | 777.19 | 578.74 | 611.90 | 785.53 | 607.94 | 278.89 | 430.61 | 106.13 | 873.17 | 395.25 | 1,183.38 | 1,529.17 | 242.90 | 413.90 | 9,752.49 | |
| | Outside | Caeerphilly | 106.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.61 | 112.20 |
| | | Cardiff | 890.20 | 0.00 | 10.99 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.33 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 10.67 | 608.13 | 1,520.32 | |
| | | Cwmbran | 383.16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 383.16 | |
| | | Monmouth | 77.78 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 77.78 | |
| | | Newport | 677.02 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 677.02 | |
| | | Other zone 1 | 285.21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 285.21 | |
| | | Brislington | 0.00 | 106.67 | 0. | | | | | | | | | | | | | | | | | | |

Table 10A: Core Catchment Comparison Goods Retail Commitments/Completions

| Area | | Comparison Sales SQ.M Net | Sales Density £ SQ.M Net | Comparison Turnover £M |
|----------------|---------------------------------------|---------------------------|--------------------------|------------------------|
| Zone 6 | Dolphin Square, Weston S-M | 3,000 | 7,000 | 21.00 |
| | RAF Locking, LeisureDome | 1,902 | 7,000 | 13.31 |
| | Portishead furniture store | 3,553 | 3,000 | 10.66 |
| Zone 7 | Peel Centre new retail warehouse unit | 1,895 | 5,000 | 9.48 |
| | Peel Centre Unit 2 mezzanine floor | 700 | 5,000 | 3.50 |
| | Sainsbury's, Gravenchon Way | 643 | 7,000 | 4.50 |
| Zone 8 | Aldi, Weymouth | 100 | 7,000 | 0.70 |
| | Charles Street Phase 2, Dorchester | 5,000 | 7,000 | 35.00 |
| Zone 9 | Bridgwater Retail Park | 5,300 | 5,000 | 26.50 |
| | Northgate, Bridgwater food store | 200 | 7,000 | 1.40 |
| Zone 10 | Firepool, Taunton | 4,800 | 7,000 | 33.60 |
| | Coal Orchard Car Park | 300 | 7,000 | 2.10 |
| | Lidl, Castle Street, Taunton | 150 | 7,000 | 1.05 |
| | Aldi, Bridwater Road, Taunton | 200 | 7,000 | 1.40 |
| Zone 11 | Meadow View Garden Centre, Gittisham | 800 | 3,000 | 2.40 |
| | Cranbrook, East Devon | 200 | 7,000 | 1.40 |
| Zone 13 | Anchorwood Bank, Barnstable | 4,000 | 5,000 | 20.00 |
| | East-the-Water Wharfs, Bideford | 200 | 7,000 | 1.40 |
| Zone 15 | Ikea, Exeter | n/a | n/a | 48.00 |
| | The Range, Exeter | n/a | n/a | 1.80 |
| | Aldi, Exeter | 100 | 7,000 | 1.80 |
| | Bus and Coach Station, Exeter | 4,950 | 7,000 | 34.65 |
| | M&S Exmouth | 150 | 7,000 | 1.05 |
| | Other Exeter | 3,201 | n/a | 18.50 |
| Zone 16 | Brunswick Wharf, Bideford | 200 | 7,000 | 1.40 |
| | Waitrose, Holsworthy | 276 | 7,000 | 1.93 |
| | Atlantic Village Extension | 8,620 | 5,000 | 43.10 |
| Zone 17 | Aldi, Newton Abbot | 200 | 7,000 | 1.40 |
| | Nortel site, Paignton (bulky goods) | 7,200 | 3,000 | 21.60 |
| | South Hams commitments | 80 | 7,000 | 0.56 |
| Zone 18 | Sherford New Community | 4,557 | 5,000 | 22.79 |
| | West Devon commitments | 164 | 7,000 | 1.15 |
| | South Hams commitments | 540 | 7,000 | 3.78 |
| | Plymouth commitments | 10,014 | 7,000 | 70.10 |
| Total | | 73,195 | | 463.00 |

Sources: Local Authority Retail Studies and the Planning Portal

Turnover density assumptions -

Town centre development = £7,000 psm net sales at 2025
 Out of centre (non-bulky) = £5,000 psm net sales at 2025
 Out of centre (bulky) = £3,000 psm net sales at 2025

Table 10B: Outer Catchment Comparison Goods Retail Commitments/Completions

| | | Comparison Sales SQ.M Net | Sales Density £ SQ.M Net | Comparison Turnover £M |
|----------------|--------------------------------------|---------------------------|--------------------------|------------------------|
| Zone 1 | NW Cardiff District Centre | 3,030 | 7,000 | 21.21 |
| | Cardiff Sports Village | 5,870 | 5,000 | 29.35 |
| | Friars Walks, Newport | 3,000 | 7,000 | 21.00 |
| | Station Quarter, Newport | 1,500 | 7,000 | 10.50 |
| | Seven Stiles, Newport | 3,250 | 3,000 | 9.75 |
| | Other Cardiff/Newport | 3,019 | 3,000 | 9.06 |
| Zone 2 | Callowhill Court, Bristol | 25,000 | 7,000 | 175.00 |
| | Other Bristol | 1,641 | 7,000 | 11.49 |
| | Asda site, Patchway | 10,489 | 7,000 | 73.42 |
| | Site 20 Merlin Road | 2,090 | 5,000 | 10.45 |
| | Other South Gloucestershire | 479 | 7,000 | 3.35 |
| | Gloucester Quays | 4,470 | 7,000 | 31.29 |
| | Other Gloucester | 113 | 7,000 | 0.79 |
| Zone 3 | Cadbury Factory, Keynsham | 150 | 7,000 | 1.05 |
| | Parcel 4200, Keynsham | 150 | 6,999 | 1.05 |
| | Foxhill, Combe Down | 200 | 7,000 | 1.40 |
| | Herman Miller Site, Bath | 2,000 | 5,000 | 10.00 |
| | Frome Road, Radstock | 250 | 7,000 | 1.75 |
| | Royal Mail Building, Chippenham | 370 | 7,000 | 2.59 |
| | Tesco, Calne | 594 | 7,000 | 4.16 |
| | Cranesbill Road, Melksham | 300 | 7,000 | 2.10 |
| | Innox Riverside, Trowbridge | 1,000 | 7,000 | 7.00 |
| | Cradle Bridge Site, Trowbridge | 347 | 7,000 | 2.43 |
| Zone 4 | Castlemore Retail Park, Warminster | 950 | 5,000 | 4.75 |
| Zone 5 | Tesco, Wimborne Road, Bournemouth | 450 | 7,000 | 3.15 |
| | Christchurch/East Dorset commitments | 1,446 | 7,000 | 10.12 |
| | Lidl Blandford Forum | 300 | 7,000 | 2.10 |
| Zone 19 | Higher Trehiddle Farm | 6,689 | 5,000 | 33.45 |
| | Lidl, Bude | 100 | 7,000 | 0.70 |
| | Lidl, St Austell | 100 | 7,000 | 0.70 |
| Total | | 79,347 | | 495.15 |

Sources: Local Authority Retail Studies and the Planning Portal

Turnover density assumptions -

Town centre development = £7,000 psm net sales at 2025

Out of centre (non-bulky) = £5,000 psm net sales at 2025

Out of centre (bulky) = £3,000 psm net sales at 2025

Table 10C: Comparison Goods Retail Allocations in Core Catchment Area

| Area | | Comparison Goods SQ.M Gross |
|----------------|---|--------------------------------|
| Zone 6 | Old Mill Road, Portishead | 4,500 |
| Zone 7 | Saxonvale/Westway Centre, Frome (CP6C) | 5,000 |
| | Street Town Centre (Core Policy 8) | 2,500 |
| | Shepton Mallet Town Centre (Core Policy 9/CP10) | 3,500 |
| | Pirnces Road/Priory Road, Wells | 5,000 |
| | Boden/Silver Street, Chard (MU/CHAR4) | 1,000 |
| Zone 10 | High Street East, Taunton (Hs1) | 10,000 |
| | High Street West, Taunton (Hs1) | 6,250 |
| | Debenhams/Goodlands, Taunton (G2) | 650 |
| | Tesco Tangier, Taunton (Tg3) | 500 |
| | Morrison's, Taunton (Cr5) | 8,000 |
| | Monkton Heathfield, Taunton (SS1) | 4,000 |
| Zone 12 | Phoenix Lane, Tiverton (AL/TIV/19 and draft TIV 12) | 2,000 |
| | Brampton Street, Tiverton (AL/TIV/20) | 500 |
| Zone 13 | Barnstable Town Centre Expansion (BAR6 and Draft BAR11) | 10,000 |
| Zone 15 | Exeter Retail Study (over and above commitments) | 34,000 |
| Zone 17 | Newton Abbott, Market Area (NA9) | 11,000 |
| | Brunswick St/Northumberland Pl, Teignmouth (TE4) | 500 |
| | Sherford New Community | 6,000 |
| Zone 18 | Plymouth Retail Study (over and above commitments) | 35,000 |
| Total | | 149,900 |

Sources: Adopted Development Plans and LPA retail studies

Table 11: Comparison Goods Commitments/Completions Trade Draw at 2025

| Zone | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|---------------|--------|---------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|---------|
| Zone 1 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 80% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 20% | 100% |
| £M Trade Draw | £80.69 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £20.17 | £100.87 |
| Zone 2 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 2% | 75% | 4% | 1% | 0% | 8% | 1% | 0% | 2% | 1% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 5% | 100% |
| £M Trade Draw | £6.12 | £229.35 | £12.23 | £3.06 | £0.00 | £24.46 | £3.06 | £0.00 | £6.12 | £3.06 | £3.06 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £15.29 | £305.79 |
| Zone 3 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 13% | 65% | 15% | 0% | 0% | 2% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 4% | 100% |
| £M Trade Draw | £0.00 | £4.36 | £21.79 | £5.03 | £0.00 | £0.00 | £0.67 | £0.34 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £1.34 | £33.53 |
| Zone 4 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 3% | 82% | 7% | 0% | 2% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 5% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.14 | £3.90 | £0.33 | £0.00 | £0.10 | £0.05 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.24 | £4.75 |
| Zone 5 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 83% | 0% | 2% | 3% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 12% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £12.76 | £0.00 | £0.31 | £0.46 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £1.84 | £15.37 |
| Zone 6 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 5% | 1% | 0% | 0% | 73% | 0% | 13% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 8% | 100% |
| £M Trade Draw | £0.00 | £2.25 | £0.45 | £0.00 | £0.00 | £32.83 | £0.00 | £5.85 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £3.60 | £44.97 |
| Zone 7 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 8% | 2% | 1% | 0% | 66% | 8% | 3% | 10% | 0% | 2% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £1.40 | £0.35 | £0.17 | £0.00 | £11.53 | £1.40 | £0.52 | £1.75 | £0.00 | £0.35 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £17.48 |
| Zone 8 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 1% | 12% | 0% | 2% | 81% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 4% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.36 | £4.28 | £0.00 | £0.71 | £28.92 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £1.43 | £35.70 |
| Zone 9 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 2% | 2% | 1% | 0% | 3% | 13% | 0% | 71% | 6% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 1% | 100% |
| £M Trade Draw | £0.00 | £0.56 | £0.56 | £0.28 | £0.00 | £0.84 | £3.63 | £0.00 | £19.81 | £1.67 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.28 | £0.00 | £0.28 | £27.90 |
| Zone 10 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 0% | 1% | 2% | 0% | 15% | 66% | 7% | 3% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 5% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.38 | £0.76 | £0.00 | £5.72 | £25.18 | £2.67 | £1.14 | £0.38 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £1.91 | £38.15 |
| Zone 11 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 1% | 0% | 3% | 78% | 10% | 0% | 0% | 4% | 1% | 0% | 0% | 0% | 1% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.08 | £0.00 | £0.00 | £0.00 | £0.00 | £0.04 | £0.00 | £0.11 | £2.96 | £0.38 | £0.00 | £0.00 | £0.15 | £0.04 | £0.00 | £0.00 | £0.00 | £0.04 | £3.80 |
| Zone 12 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 7% | 79% | 4% | 2% | 7% | 0% | 0% | 0% | 1% | 0% | 100% | |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 |
| Zone 13 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 65% | 2% | 0% | 30% | 0% | 0% | 2% | 0% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.21 | £0.00 | £0.00 | £13.91 | £0.43 | £0.00 | £6.42 | £0.00 | £0.00 | £0.43 | £0.00 | £21.40 |
| Zone 14 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 86% | 8% | 6% | 0% | 0% | 0% | 0% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 |
| Zone 15 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 2% | 15% | 8% | 2% | 4% | 47% | 6% | 8% | 1% | 1% | 5% | 100% |
| £M Trade Draw | £0.00 | £1.06 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £2.12 | £15.87 | £8.46 | £2.12 | £4.23 | £49.73 | £6.35 | £8.46 | £1.06 | £1.06 | £5.29 | £105.80 |
| Zone 16 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 4% | 1% | 5% | 72% | 0% | 0% | 2% | 15% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.46 | £1.86 | £0.46 | £2.32 | £33.43 | £0.00 | £0.00 | £0.93 | £6.96 | £46.43 |
| Zone 17 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% | 4% | 0% | 89% | 3% | 0% | 2% | 100% |
| £M Trade Draw | £0.00 | £0.24 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.24 | £0.00 | £0.00 | £0.00 | £0.00 | £0.94 | £0.00 | £20.97 | £0.71 | £0.00 | £0.47 | £23.56 |
| Zone 18 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 4% | 75% | 11% | 8% | 100% | |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.00 | £0.98 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.98 | £3.91 | £73.36 | £10.76 | £7.82 | £97.81 | |
| Zone 19 | | | | | | | | | | | | | | | | | | | | | |
| % Trade Draw | 0% | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 6% | 0% | 5% | 82% | 5% | 100% |
| £M Trade Draw | £0.00 | £0.00 | £0.00 | £0.70 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £2.09 | £0.00 | £1.74 | £28.57 | £1.74 | £34.85 |
| Total | £86.81 | £237.80 | £36.65 | £13.66 | £18.53 | £58.51 | £20.77 | £37.04 | £32.17 | £33.89 | £25.01 | £10.80 | £18.26 | £5.12 | £53.14 | £49.31 | £33.34 | £77.14 | £41.75 | £68.43 | £958.10 |

Source: Table 10A and 10B trade draw based on existing trading patterns within each zone estimated from 2014 household survey results

Table 12: Comparison Goods Trading Patterns 2025 - With All Commitments/Completions (€M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|-------------------------|----------------------------|----------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|--------|----------|--------|--------|-----------|
| Available Expenditure | | 2,165.14 | 3,351.18 | 1,377.19 | 746.41 | 2,110.61 | 788.99 | 704.00 | 549.35 | 549.96 | 611.96 | 476.26 | 210.74 | 328.77 | 80.33 | 659.44 | 312.85 | 903.78 | 1,206.38 | 610.33 | | 17,743.67 |
| Commitments/Completions | | 86.81 | 237.80 | 36.65 | 13.66 | 18.53 | 58.51 | 20.77 | 37.04 | 32.17 | 33.89 | 25.01 | 10.80 | 18.26 | 5.12 | 53.14 | 49.31 | 33.34 | 77.14 | 41.75 | 68.43 | 958.16 |
| Core Catchment | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.01 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.01 |
| | Weston-super-mare | 0.00 | 3.43 | 6.63 | 0.00 | 0.00 | 317.93 | 0.98 | 0.00 | 68.37 | 0.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47.53 | 445.51 |
| | Other zone 6 | 0.00 | 26.86 | 0.00 | 0.00 | 0.00 | 64.19 | 0.00 | 0.00 | 6.72 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 97.78 |
| | Frome | 0.00 | 0.00 | 55.95 | 9.53 | 0.00 | 0.00 | 17.77 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 83.24 |
| | Shepton Mallet | 0.00 | 0.00 | 1.36 | 0.00 | 0.00 | 0.00 | 25.55 | 0.00 | 13.72 | 0.00 | 0.61 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 41.24 |
| | Yeovil | 0.00 | 0.00 | 2.65 | 6.25 | 2.09 | 0.00 | 373.55 | 49.22 | 12.13 | 74.14 | 16.01 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 536.04 |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 1.91 | 2.10 | 0.00 | 80.59 | 4.57 | 0.00 | 0.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.19 | 0.00 | 91.09 |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 52.08 | 0.00 | 0.00 | 1.15 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 53.23 |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 41.76 | 0.00 | 7.03 | 163.41 | 0.00 | 0.99 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 213.19 |
| | Weymouth | 0.00 | 0.00 | 0.00 | 2.80 | 14.62 | 0.00 | 0.00 | 130.76 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.48 | 165.66 |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.25 | 0.00 | 0.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.84 |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.47 | 0.00 | 0.00 | 0.00 | 0.00 | 84.90 | 11.76 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 97.12 |
| | Street | 0.00 | 0.00 | 4.09 | 0.00 | 0.00 | 0.00 | 20.05 | 0.00 | 36.92 | 0.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 61.44 |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.13 | 2.56 | 0.00 | 33.52 | 0.00 | 0.36 | 0.56 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.14 |
| | Clarks Village, Street | 0.00 | 1.91 | 3.98 | 2.89 | 0.00 | 1.85 | 14.07 | 0.32 | 20.12 | 6.76 | 0.40 | 0.00 | 0.00 | 0.31 | 0.00 | 0.00 | 0.46 | 3.36 | 0.00 | 3.12 | 59.55 |
| | Other zone 9 | 0.00 | 4.48 | 0.00 | 0.00 | 0.00 | 5.11 | 6.50 | 0.00 | 60.26 | 1.99 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 78.34 |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.98 | 0.00 | 0.00 | 0.00 | 14.32 | 0.00 | 0.00 | 4.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.12 | 22.04 |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.10 | 12.20 | 0.00 | 89.96 | 369.13 | 45.92 | 18.62 | 4.21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 30.22 | 574.34 |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.65 | 0.00 | 0.78 | 41.04 | 0.61 | 0.94 | 0.00 | 0.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.06 |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.83 | 28.11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.94 |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 34.35 | 0.59 | 0.00 | 0.26 | 4.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.01 |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.67 | 16.71 | 0.00 | 0.00 | 1.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 50.43 |
| | Sidmouth | 0.00 | 0.00 | 5.41 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 31.13 | 3.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.15 | 41.88 |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.64 | 1.58 | 0.00 | 1.60 | 46.60 | 2.28 | 0.00 | 0.00 | 3.29 | 0.65 | 0.00 | 0.00 | 0.00 | 0.00 | 56.63 |
| | Cullompton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.03 | 7.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.59 | 0.00 | 11.36 |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.38 | 2.32 | 54.35 | 3.30 | 1.27 | 4.71 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 66.32 |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.61 | 0.08 | 0.18 | 0.46 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.33 |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.19 | 1.62 | 245.80 | 8.37 | 0.00 | 100.23 | 0.00 | 0.00 | 5.44 | 0.00 | 365.64 |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.26 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.26 |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.09 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.09 |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.75 | 0.27 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.02 |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.83 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.83 |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.04 | 0.23 | 0.00 | 0.00 | 0.00 | 0.00 | 1.27 |
| | Credton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20.60 | 1.68 | 1.00 | 0.00 | 0.00 | 0.00 | 23.29 |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.12 | 0.00 | 0.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.52 |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.10 | 0.00 | 0.00 | 24.92 | 174.60 | 88.59 | 27.39 | 41.15 | 501.74 | 55.49 | 95.12 | 13.44 | 9.79 | 58.84 | 1,095.17 |
| | Other zone 15 | 0.00 | 6.11 | 0.00 | 0.00 | 0.00 | 2.92 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.25 | 0.00 | 0.06 | 40.12 | 1.57 | 0.48 | 0.00 | 0.00 | 0.00 | 52.50 |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.25 | 0.37 | 1.99 | 36.49 | 0.00 | 0.00 | 0.00 | 0.00 | 39.10 |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.56 | 0.00 | 0.15 | 0.00 | 13.02 | 0.00 | 0.00 | 0.00 | 0.00 | 13.73 |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.75 | 8.88 | 0.00 | 0.00 | 0.00 | 0.00 | 11.63 |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.78 | 0.00 | 0.00 | 1.68 | 0.00 | 0.00 | 1.63 | 5.78 | 10.87 |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.25 | 2.25 | 0.31 | 0.00 | 15.27 | 0.00 | 0.00 | 0.00 | 0.00 | 18.09 |
| | Dartmouth | 0.00 | 8.95 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.20 | 0.00 | 0.00 | 0.00 | 36.16 |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.56 | 2.30 | 0.29 | 0.00 | 0.00 | 26.82 | 0.74 | 279.91 | 8.96 | 0.00 | 0.00 | 319.57 |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.40 | 0.00 | 1.26 | 0.34 | 0.00 | 0.00 | 4.78 | 0.00 | 260.56 | 5.60 | 0.00 | 14.86 | 287.80 |
| | Other zone 17 | 0.00 | 2.44 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.64 | 0.00 | 0.00 | 0.11 | 0.00 | 0.24 | 134.21 | 3.55 | 0.00 | 0.00 | 142.19 |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.25 | 0.00 | 0.00 | 27.25 |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | | | |

Table 13: Designer Outlet Village Comparison Goods Trade Draw and Turnover

| Zone | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|-------|-------|-------|-------|-------|--------|---------------|
| % Trade Draw | 1% | 2% | 1% | 1% | 1% | 2% | 1% | 1% | 3% | 10% | 10% | 25% | 10% | 3% | 10% | 2% | 2% | 1% | 1% | 13% | 100% |
| £M Trade Draw | £0.67 | £1.34 | £0.67 | £0.67 | £0.67 | £1.34 | £0.67 | £0.67 | £2.01 | £6.69 | £6.69 | £16.72 | £6.69 | £2.01 | £6.69 | £1.34 | £1.34 | £0.67 | £0.67 | £8.70 | £66.89 |

Notes:

DOV retail floorspace = 13,935 sq.m gross. Net sales to gross of 80% = 11,148 sq.m net sales.

Comparison goods turnover 11,148 sq.m net at £6,000 per sq.m net sales = £66.89 million at 2025.

Table 14: Comparison Goods Trading Patterns 2025 - With Commitments and DOV (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total | |
|-----------------------|----------------------------|------------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|----------|--------|-----------|----------|
| Available Expenditure | | 2,165.14 | 3,351.18 | 1,377.19 | 746.41 | 2,110.61 | 788.99 | 704.00 | 549.35 | 549.96 | 611.96 | 476.26 | 210.74 | 328.77 | 80.33 | 659.44 | 312.85 | 903.78 | 1,206.38 | 610.33 | | 17,743.67 | |
| DOV Proposal | | 0.67 | 1.34 | 0.67 | 0.67 | 0.67 | 1.34 | 0.67 | 0.67 | 2.01 | 6.69 | 6.69 | 16.72 | 6.69 | 2.01 | 6.69 | 1.34 | 1.34 | 0.67 | 0.67 | 8.70 | 66.89 | |
| Commitments | | 86.78 | 237.73 | 36.63 | 13.65 | 18.52 | 58.42 | 20.74 | 36.99 | 32.04 | 33.47 | 24.45 | 9.31 | 17.59 | 4.89 | 52.20 | 48.96 | 33.29 | 77.11 | 41.69 | 68.37 | 952.84 | |
| Core Catchment | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.99 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.99 | |
| | Weston-super-mare | 0.00 | 3.43 | 6.63 | 0.00 | 0.00 | 317.45 | 0.98 | 0.00 | 68.09 | 0.63 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47.49 | 444.69 | |
| | Other zone 6 | 0.00 | 26.86 | 0.00 | 0.00 | 0.00 | 64.14 | 0.00 | 0.00 | 6.71 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 97.71 | |
| | Frome | 0.00 | 0.00 | 55.93 | 9.52 | 0.00 | 0.00 | 17.75 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 83.21 | |
| | Shepton Mallet | 0.00 | 0.00 | 1.36 | 0.00 | 0.00 | 0.00 | 25.53 | 0.00 | 13.69 | 0.00 | 0.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 41.19 | |
| | Yeovil | 0.00 | 0.00 | 2.65 | 6.25 | 2.09 | 0.00 | 373.28 | 49.19 | 12.10 | 73.68 | 15.83 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 535.07 | |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 1.90 | 2.10 | 0.00 | 80.53 | 4.57 | 0.00 | 0.73 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.19 | 0.00 | 91.02 | |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 52.04 | 0.00 | 0.00 | 1.14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 53.18 | |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 41.75 | 0.00 | 7.02 | 163.19 | 0.00 | 0.97 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 212.93 | |
| | Weymouth | 0.00 | 0.00 | 0.00 | 2.80 | 14.61 | 0.00 | 0.00 | 130.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.47 | 165.46 | |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.24 | 0.00 | 0.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.83 | |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.47 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 84.72 | 11.68 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 96.87 | |
| | Street | 0.00 | 0.00 | 4.09 | 0.00 | 0.00 | 0.00 | 0.00 | 20.04 | 0.00 | 36.84 | 0.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 61.34 | |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.12 | 2.56 | 0.00 | 33.46 | 0.00 | 0.36 | 0.52 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.02 | |
| | Clarks Village, Street | 0.00 | 1.90 | 3.98 | 2.88 | 0.00 | 1.85 | 14.02 | 0.32 | 19.92 | 6.55 | 0.38 | 0.00 | 0.00 | 0.28 | 0.00 | 0.00 | 0.46 | 3.36 | 0.00 | 3.11 | 58.99 | |
| | Other zone 9 | 0.00 | 4.48 | 0.00 | 0.00 | 0.00 | 5.10 | 6.50 | 0.00 | 60.14 | 1.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 78.19 | |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.98 | 0.00 | 0.00 | 0.00 | 14.23 | 0.00 | 0.00 | 4.54 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.11 | 21.86 | |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.09 | 12.18 | 0.00 | 89.59 | 364.58 | 44.89 | 16.05 | 4.06 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 30.19 | 565.63 | |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.65 | 0.00 | 0.78 | 40.78 | 0.60 | 0.88 | 0.00 | 0.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 44.73 | |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.79 | 27.79 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.59 | |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.96 | 0.54 | 0.00 | 0.26 | 4.77 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 39.54 | |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.31 | 15.56 | 0.00 | 0.00 | 1.04 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 48.90 | |
| | Sidmouth | 0.00 | 0.00 | 5.41 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 30.78 | 2.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.15 | 41.31 | |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.63 | 1.58 | 0.00 | 1.59 | 46.08 | 2.12 | 0.00 | 0.00 | 3.26 | 0.64 | 0.00 | 0.00 | 0.00 | 0.00 | 55.91 | |
| | Cullumpton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.99 | 7.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.59 | 0.00 | 10.79 | |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.36 | 23.00 | 50.60 | 3.24 | 1.24 | 4.67 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 62.41 | |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.57 | 0.08 | 0.17 | 0.45 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.28 | |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.14 | 1.51 | 241.24 | 8.18 | 0.00 | 99.88 | 0.00 | 0.00 | 5.43 | 0.00 | 360.38 | |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.17 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.17 | |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.00 | |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.62 | 0.27 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.89 | |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.79 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.79 | |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.02 | 0.23 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.25 | |
| | Credton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20.13 | 1.67 | 1.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22.80 | |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.11 | 0.00 | 0.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.51 | |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.09 | 0.00 | 0.00 | 24.77 | 172.65 | 82.47 | 26.88 | 40.21 | 497.31 | 55.30 | 95.04 | 13.43 | 9.78 | 58.82 | 1,080.76 | |
| | Other zone 15 | 0.00 | 6.10 | 0.00 | 0.00 | 0.00 | 2.92 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.16 | 0.00 | 0.06 | 39.77 | 1.56 | 0.48 | 0.00 | 0.00 | 0.00 | 52.05 | |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.25 | 0.36 | 1.97 | 36.37 | 0.00 | 0.00 | 0.00 | 0.00 | 38.95 | |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.52 | 0.00 | 0.14 | 0.00 | 12.98 | 0.00 | 0.00 | 0.00 | 0.00 | 13.64 | |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.73 | 8.85 | 0.00 | 0.00 | 0.00 | 0.00 | 11.58 | |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.62 | 0.00 | 0.00 | 1.65 | 0.00 | 0.00 | 1.63 | 5.76 | 10.66 | |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.24 | 2.21 | 0.31 | 0.00 | 15.22 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17.97 | |
| | Dartmouth | 0.00 | 8.95 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.18 | 0.00 | 0.00 | 0.00 | 36.13 | |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.56 | 2.24 | 0.25 | 0.00 | 0.00 | 26.35 | 0.73 | 279.43 | 8.95 | 0.00 | 0.00 | 318.52 | |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.40 | 0.00 | 1.23 | 0.29 | 0.00 | 0.00 | 4.69 | 0.00 | 260.12 | 5.60 | 0.00 | 14.85 | 287.18 | |
| | Other zone 17 | 0.00 | 2.44 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.62 | 0.00 | 0.00 | 0.10 | 0.00 | 0.24 | 134.09 | 3.55 | 0.00 | 0.00 | 142.05 | |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 27.24 | 0.00 | 0.00 | 27.24 | |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 12.69 | 20.14 | 0.00 | 0.00 | 32.83 | |
| | Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 12.52 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.27 | 0.00 | 0.00 | 0.00 | 1.25 | 6.79 | 41.60 | 844.89 | 139.48 | 124.60 | 1,173.41 | |
| | Tavistock | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.61 | 0.00 | 98.14 | 2.80 | 0.00 | 0.00 | 102.55 | |
| | Other zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.04 | 2.63 | 52.12 | 0.00 | 0.00 | 0.00 | 56.79 | |
| | Sub-Total | Sub-Total | 0.00 | 54.17 | 80.06 | 23.82 | 73.07 | 425.65 | 566.76 | 407.71 | 426.44 | 549.84 | 424.18 | 183.45 | 302.70 | 72.89 | 590.15 | 245.26 | 853.72 | 1,077.42 | 160.91 | 305.55 | 7,843.48 |
| | Outside Catchment | Caerphilly | 73.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.19 | 82.18 |
| | | Cardiff | 68.61 | 0.00 | 7.95 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.22 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.06 | 450.90 | 1,099.74 | |
| | | Cwmbran | 280.36 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 280.36 |
| | | Monmouth | 56.92 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56.92 |
| Newport | | 482.03 | 0.00 | 0.00 | 0.00 | 0.0 | | | | | | | | | | | | | | | | | |

Table 15: Comparison Goods Trading Patterns 2029 - With Commitments and DOV (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|-----------------------|----------------------------|----------|----------|----------|--------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|--------|----------|----------|--------|--------|-----------|
| Available Expenditure | | 2,500.54 | 3,911.37 | 1,591.27 | 858.09 | 2,457.32 | 921.80 | 812.70 | 632.12 | 640.24 | 707.98 | 552.66 | 243.58 | 377.68 | 92.95 | 767.46 | 363.68 | 1,044.77 | 1,391.36 | 709.03 | | 20,576.62 |
| DOV Proposal | | 0.77 | 1.56 | 0.77 | 0.77 | 0.78 | 1.56 | 0.77 | 0.77 | 2.34 | 7.74 | 7.76 | 19.33 | 7.68 | 2.32 | 7.78 | 1.56 | 1.55 | 0.77 | 0.78 | 10.08 | 77.45 |
| Commitments | | 100.22 | 277.47 | 42.32 | 15.69 | 21.56 | 68.26 | 23.94 | 42.57 | 37.30 | 38.72 | 28.38 | 10.76 | 20.20 | 5.66 | 60.76 | 56.92 | 38.48 | 88.93 | 48.44 | 79.29 | 1,105.87 |
| Core Catchment | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 29.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 29.20 |
| | Weston-super-mare | 0.00 | 4.00 | 7.66 | 0.00 | 0.00 | 370.89 | 1.13 | 0.00 | 79.27 | 0.72 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 55.07 | 518.74 |
| | Other zone 6 | 0.00 | 31.35 | 0.00 | 0.00 | 0.00 | 74.94 | 0.00 | 0.00 | 7.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 114.10 |
| | Frome | 0.00 | 0.00 | 64.63 | 10.95 | 0.00 | 0.00 | 20.49 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 96.07 |
| | Shepton Mallet | 0.00 | 0.00 | 1.58 | 0.00 | 0.00 | 0.00 | 29.47 | 0.00 | 15.94 | 0.00 | 0.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 47.68 |
| | Yeovil | 0.00 | 0.00 | 3.07 | 7.18 | 2.43 | 0.00 | 430.92 | 56.60 | 14.09 | 85.24 | 18.37 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 617.89 |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 2.19 | 2.45 | 0.00 | 92.96 | 5.25 | 0.00 | 0.85 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.38 | 0.00 | 105.08 |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 59.88 | 0.00 | 0.00 | 1.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 61.20 |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 48.60 | 0.00 | 8.11 | 187.77 | 0.00 | 1.13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 245.61 |
| | Weymouth | 0.00 | 0.00 | 0.00 | 3.21 | 17.01 | 0.00 | 0.00 | 150.26 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20.26 | 190.74 |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.19 | 0.00 | 0.68 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.86 |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.54 | 0.00 | 0.00 | 0.00 | 0.00 | 98.63 | 13.52 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 112.69 |
| | Street | 0.00 | 0.00 | 4.73 | 0.00 | 0.00 | 0.00 | 23.13 | 0.00 | 42.89 | 0.42 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 71.11 |
| | Wells | 0.00 | 0.00 | 4.59 | 0.00 | 0.00 | 0.00 | 3.65 | 2.96 | 0.00 | 38.95 | 0.00 | 0.42 | 0.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.57 |
| | Clarks Village, Street | 0.00 | 2.22 | 4.59 | 3.31 | 0.00 | 2.16 | 16.18 | 0.36 | 23.19 | 7.58 | 0.44 | 0.00 | 0.00 | 0.32 | 0.00 | 0.00 | 0.53 | 3.87 | 0.00 | 3.61 | 68.37 |
| | Other zone 9 | 0.00 | 5.23 | 0.00 | 0.00 | 0.00 | 5.96 | 7.50 | 0.00 | 70.01 | 2.29 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 90.99 |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.31 | 0.00 | 0.00 | 0.00 | 16.46 | 0.00 | 0.00 | 5.22 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.29 | 25.28 |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.78 | 14.06 | 0.00 | 104.30 | 421.78 | 52.09 | 18.55 | 4.66 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 35.01 | 655.23 |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.90 | 0.00 | 0.90 | 47.18 | 0.70 | 1.01 | 0.00 | 0.06 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 51.75 |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.70 | 32.25 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 38.96 |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 39.41 | 0.63 | 0.00 | 0.30 | 5.55 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.89 |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 37.49 | 17.98 | 0.00 | 0.00 | 1.21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56.68 |
| | Sidmouth | 0.00 | 0.00 | 6.25 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 35.72 | 3.45 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.49 | 47.90 |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.73 | 1.82 | 0.00 | 1.84 | 53.47 | 2.45 | 0.00 | 0.00 | 3.79 | 0.75 | 0.00 | 0.00 | 0.00 | 0.00 | 64.85 |
| | Cullompton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.48 | 8.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.69 | 0.00 | 12.49 | |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.42 | 2.66 | 58.49 | 3.72 | 1.44 | 5.43 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 72.16 |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.66 | 0.10 | 0.20 | 0.53 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.48 |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.81 | 1.74 | 277.13 | 9.47 | 0.00 | 116.10 | 0.00 | 0.00 | 6.31 | 0.00 | 0.00 | 415.56 |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.93 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.93 |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.74 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.74 |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.61 | 0.31 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.92 |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.06 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.06 |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.18 | 0.26 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.45 |
| | Credton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 23.29 | 1.94 | 1.16 | 0.00 | 0.00 | 0.00 | 0.00 | 26.40 |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.13 | 0.00 | 0.47 | 0.00 | 0.00 | 0.00 | 0.00 | 0.60 |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.72 | 0.00 | 0.00 | 28.66 | 200.35 | 95.32 | 30.88 | 46.53 | 578.78 | 64.29 | 109.86 | 15.49 | 11.36 | 68.21 | 1,254.45 |
| | Other zone 15 | 0.00 | 7.13 | 0.00 | 0.00 | 0.00 | 3.41 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.34 | 0.00 | 0.07 | 46.28 | 1.82 | 0.55 | 0.00 | 0.00 | 0.00 | 60.59 |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.29 | 0.42 | 2.29 | 42.27 | 0.00 | 0.00 | 0.00 | 0.00 | 45.27 |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.60 | 0.00 | 0.17 | 0.00 | 15.08 | 0.00 | 0.00 | 0.00 | 0.00 | 15.85 |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.17 | 10.29 | 0.00 | 0.00 | 0.00 | 0.00 | 13.46 |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.86 | 0.00 | 0.00 | 1.92 | 0.00 | 0.00 | 1.89 | 6.68 | 12.35 |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.27 | 2.54 | 0.35 | 0.00 | 17.69 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20.85 |
| | Dartmouth | 0.00 | 10.45 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 31.42 | 0.00 | 0.00 | 0.00 | 41.87 |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.64 | 2.60 | 0.29 | 0.00 | 0.00 | 30.66 | 0.85 | 323.02 | 10.33 | 0.00 | 0.00 | 368.40 |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.46 | 0.00 | 1.43 | 0.34 | 0.00 | 0.00 | 5.46 | 0.00 | 300.69 | 6.45 | 0.00 | 17.22 | 332.07 |
| | Other zone 17 | 0.00 | 2.85 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.88 | 0.00 | 0.00 | 0.12 | 0.00 | 0.28 | 155.01 | 4.10 | 0.00 | 0.00 | 164.24 |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 31.42 | 0.00 | 0.00 | 31.42 |

Table 16: Comparison Goods Trading Patterns 2033 - With Commitments and DOV (£M)

| Area | Zones | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | Inflow | Total |
|------------------------------|----------------------------|-------------|--------------|---------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|---------------|-----------------|-----------------|---------------|---------------|------------------|
| Available Expenditure | | 2,880.92 | 4,550.10 | 1,831.72 | 985.07 | 2,850.41 | 1,072.68 | 936.24 | 725.94 | 742.40 | 817.15 | 639.03 | 280.89 | 433.16 | 106.96 | 888.32 | 420.97 | 1,204.54 | 1,599.55 | 820.62 | | 23,786.65 |
| DOV Proposal | | 0.89 | 1.82 | 0.89 | 0.88 | 0.90 | 1.82 | 0.89 | 0.88 | 2.71 | 8.93 | 8.98 | 22.29 | 8.81 | 2.67 | 9.01 | 1.80 | 1.78 | 0.89 | 0.90 | 11.66 | 89.40 |
| Commitments | | 115.47 | 322.78 | 48.72 | 18.01 | 25.01 | 79.43 | 27.58 | 48.88 | 43.25 | 44.69 | 32.81 | 12.41 | 23.17 | 6.51 | 70.32 | 65.88 | 44.37 | 102.24 | 56.06 | 91.66 | 1,279.26 |
| Core | Portishead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.98 |
| Catchment | Weston-super-mare | 0.00 | 4.66 | 8.82 | 0.00 | 0.00 | 431.59 | 1.30 | 0.00 | 91.92 | 0.84 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 63.66 | 602.78 |
| | Other zone 6 | 0.00 | 36.47 | 0.00 | 0.00 | 0.00 | 87.21 | 0.00 | 0.00 | 9.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 132.73 |
| | Frome | 0.00 | 0.00 | 74.39 | 12.57 | 0.00 | 0.00 | 23.61 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 110.57 |
| | Shepton Mallet | 0.00 | 0.00 | 1.81 | 0.00 | 0.00 | 0.00 | 33.95 | 0.00 | 18.48 | 0.00 | 0.80 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 55.06 |
| | Yeovil | 0.00 | 0.00 | 3.53 | 8.24 | 2.82 | 0.00 | 496.42 | 65.00 | 16.34 | 98.38 | 21.25 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 711.98 |
| | Other zone 7 | 0.00 | 0.00 | 0.00 | 2.51 | 2.84 | 0.00 | 107.09 | 6.03 | 0.00 | 0.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.60 | 0.00 | 121.06 |
| | Bridport | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 68.77 | 0.00 | 0.00 | 1.53 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 70.30 |
| | Dorchester | 0.00 | 0.00 | 0.00 | 0.00 | 56.38 | 0.00 | 9.34 | 215.64 | 0.00 | 1.30 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 282.66 |
| | Weymouth | 0.00 | 0.00 | 0.00 | 3.69 | 19.73 | 0.00 | 0.00 | 172.56 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 23.42 | 219.40 |
| | Other zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.25 | 0.00 | 0.78 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.04 |
| | Bridgwater | 0.00 | 0.00 | 0.00 | 0.62 | 0.00 | 0.00 | 0.00 | 0.00 | 114.37 | 15.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 130.59 |
| | Street | 0.00 | 0.00 | 5.44 | 0.00 | 0.00 | 0.00 | 26.65 | 0.00 | 49.74 | 0.49 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 82.32 |
| | Wells | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.25 | 3.41 | 0.00 | 45.16 | 0.00 | 0.48 | 0.69 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 53.99 |
| | Clarks Village, Street | 0.00 | 2.59 | 5.29 | 3.80 | 0.00 | 2.51 | 18.64 | 0.42 | 26.89 | 8.75 | 0.51 | 0.00 | 0.00 | 0.37 | 0.00 | 0.00 | 0.62 | 4.45 | 0.00 | 4.17 | 78.99 |
| | Other zone 9 | 0.00 | 6.08 | 0.00 | 0.00 | 0.00 | 6.94 | 8.64 | 0.00 | 81.18 | 2.64 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 105.48 |
| | Minehead | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.69 | 0.00 | 0.00 | 19.00 | 0.00 | 0.00 | 5.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.49 | 29.17 |
| | Taunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.56 | 16.20 | 0.00 | 120.94 | 486.82 | 60.23 | 21.39 | 5.35 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.47 | 756.96 |
| | Other zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.19 | 0.00 | 1.05 | 54.46 | 0.80 | 1.17 | 0.00 | 0.06 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 59.73 |
| | Chard | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.74 | 37.29 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.03 |
| | Exmouth | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.57 | 0.73 | 0.00 | 0.34 | 6.43 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 53.07 |
| | Honiton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 43.35 | 20.73 | 0.00 | 0.00 | 1.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 65.48 |
| | Sidmouth | 0.00 | 0.00 | 7.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 41.30 | 3.97 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 820.00 | 2.88 | 55.34 |
| | Other zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.84 | 2.09 | 0.00 | 2.12 | 61.83 | 2.82 | 0.00 | 0.00 | 4.39 | 0.87 | 0.00 | 0.00 | 0.00 | 0.00 | 74.96 |
| | Cullompton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.02 | 9.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.80 | 0.00 | 0.00 | 14.42 |
| | Tiverton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.48 | 3.08 | 67.45 | 4.27 | 1.65 | 6.29 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 83.22 |
| | Other zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.76 | 0.11 | 0.23 | 0.61 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.71 |
| | Barnstaple | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.56 | 2.01 | 317.83 | 10.89 | 0.00 | 134.39 | 0.00 | 0.00 | 7.31 | 0.00 | 0.00 | 477.99 |
| | Braunton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.81 |
| | Ilfracombe | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.59 |
| | South Molton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.73 | 0.36 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.08 |
| | Other zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.36 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.36 |
| | Chulmleigh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.36 | 0.31 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.67 |
| | Credton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 26.80 | 2.24 | 1.35 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 30.39 |
| | Other zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.15 | 0.00 | 0.54 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.69 |
| | Exeter | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.44 | 0.00 | 0.00 | 33.07 | 231.66 | 109.93 | 35.42 | 53.54 | 669.93 | 74.41 | 126.66 | 17.81 | 13.15 | 78.85 | 1,449.87 |
| | Other zone 15 | 0.00 | 8.29 | 0.00 | 0.00 | 0.00 | 3.96 | 0.00 | 0.00 | 0.00 | 0.00 | 1.55 | 0.00 | 0.08 | 53.57 | 2.10 | 0.64 | 0.00 | 0.00 | 0.00 | 0.00 | 70.19 |
| | Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.33 | 0.48 | 2.65 | 48.93 | 0.00 | 0.00 | 0.00 | 0.00 | 52.40 |
| | Holsworthy | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.69 | 0.00 | 0.19 | 0.00 | 17.46 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 18.35 |
| | Okehampton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.67 | 11.91 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15.58 |
| | Atlantic Village, Bideford | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.13 | 0.00 | 0.00 | 2.22 | 0.00 | 0.00 | 2.19 | 7.73 | 14.27 |
| | Other zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.32 | 2.91 | 0.41 | 0.00 | 20.48 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.11 |
| | Dartmouth | 0.00 | 12.16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.22 | 0.00 | 0.00 | 0.00 | 0.00 | 48.38 |
| | Newton Abbott | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.74 | 3.01 | 0.33 | 0.00 | 0.00 | 35.49 | 0.99 | 372.42 | 11.87 | 0.00 | 0.00 | 424.86 |
| | Torquay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.54 | 0.00 | 1.66 | 0.39 | 0.00 | 0.00 | 6.32 | 0.00 | 346.68 | 7.42 | 0.00 | 19.91 | 382.91 |
| | Other zone 17 | 0.00 | 3.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.17 | 0.00 | 0.00 | 0.14 | 0.00 | 0.32 | 178.71 | 4.71 | 0.00 | 0.00 | 189.37 |
| | Ivybridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.12 | 0.00 | 0.00 | 36.12 |
| | Kingsbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 16.91 | 26.70 | 0.00 | 0.00 | 0.00 | 0.00 | 43.61 |
| | Plymouth | 0.00 | 0.00 | 0.00 | 0.00 | 16.91 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.05 | 0.00 | 0.00 | 0.00 | 1.68 | 9.14 | 55.45 | 1,120.24 | 187.54 | 167.04 | 1,561.05 |
| | Tavistock | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.16 | 0.00 | 130.13 | 3.77 | 0.00 | 0.00 | 136.05 |
| | Other zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.75 | 3.51 | 69.10 | 0.00 | 0.00 | 0.00 | 75.36 |
| Sub-Total | Sub-Total | 0.00 | 73.55 | 106.48 | 31.44 | 98.69 | 578.69 | 753.73 | 538.76 | 575.65 | 734.20 | 569.15 | 244.52 | 398.81 | 97.06 | 794.99 | 330.02 | 1,137.82 | 1,428.56 | 216.35 | 408.62 | 10,486.73 |
| Outside | Caerphilly | 103.78 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.62 | 109.40 |
| Catchment | Cardiff | 843.07 | 0.00 | 10.58 | 0.00 | 0.00 | 0.00 | | | | | | | | | | | | | | | |

Table 17: Comparison Goods Surplus Retail Expenditure Projections (constant market shares)

| | 2014 | 2018 | 2025 | 2029 | 2033 |
|--|------------|---------------|---------------|-----------------|-----------------|
| Core Catchment Area | | | | | |
| Total available expenditure £M | 5,122.89 | 5,819.46 | 7,298.95 | 8,450.57 | 9,752.49 |
| Turnover of existing facilities £M * | 5,122.89 | 5,750.80 | 6,703.55 | 7,313.22 | 7,978.33 |
| Turnover of commitments/completions £M | n/a | n/a | 463.00 | 505.11 | 551.05 |
| Residual Expenditure £M | n/a | 68.67 | 132.40 | 632.24 | 1,223.11 |
| Outer Catchment Area | | | | | |
| Total available expenditure £M | 7,518.26 | 8,583.63 | 10,823.55 | 12,565.07 | 14,541.26 |
| Turnover of existing facilities £M* | 7,518.26 | 8,439.77 | 9,838.01 | 10,732.75 | 11,708.86 |
| Turnover of commitments £M | n/a | n/a | 495.15 | 540.19 | 589.32 |
| Residual Expenditure £M | n/a | 143.86 | 490.38 | 1,292.13 | 2,243.09 |
| Total Residual Expenditure £M | n/a | 212.53 | 622.78 | 1,924.37 | 3,466.19 |

Source: Tables 5 to 10B

Experian Growth in existing and commitments turnover:

5.3% in 2015; 4.3% in 2016; 1.3% in 2017; 0.9% in 2018; 1.8% in 2019; 2.3% p.a. between 2020-24 and 2.2% p.a 2025 and beyond

Table 18: Comparison Goods Retail Floorspace Capacity (over and above commitments)

| | 2018 | 2025 | 2029 | 2033 |
|--|--------|----------------|----------------|----------------|
| Comparison goods sales density (£ SQ.M Net) | 6,000 | 6,994 | 7,630 | 8,324 |
| Core Catchment Area | | | | |
| Surplus Expenditure £M | 68.66 | 132.37 | 632.18 | 1,223.02 |
| Floorspace Capacity SQ.M Net Sales | n/a | 18,926 | 82,854 | 146,926 |
| Floorspace Capacity SQ.M Gross | n/a | 25,235 | 110,472 | 195,902 |
| Outer Catchment Area | | | | |
| Surplus Expenditure £M | 143.86 | 490.38 | 1,292.13 | 2,243.09 |
| Floorspace Capacity SQ.M Net Sales | n/a | 70,114 | 169,345 | 269,470 |
| Floorspace Capacity SQ.M Gross | n/a | 93,486 | 225,794 | 359,293 |
| Total Capacity | | | | |
| Floorspace Capacity SQ.M Net Sales | n/a | 89,041 | 252,199 | 416,397 |
| Floorspace Capacity SQ.M Gross | n/a | 118,721 | 336,266 | 555,195 |

Source: Table 17

Average net sales to gross ratio =75%

Table 19: DOV Impact Summary at 2025

| | Base Year Turnover 2014 £M | Current Year Turnover 2018 £M | Design Year Turnover No Dev. 2025 £M | Design Year Turnover with Commitmt. 2026 £M | % Impact of Commitments | Design Year Turnover with DOV 2025 £M | Trade Diversion to DOV 2025 £M | % Solus Impact of DOV | % Cumulative Impact |
|----------------------------|----------------------------------|-------------------------------------|--|---|-------------------------------|---|--------------------------------------|-----------------------------|---------------------------|
| COLUMN | A | B | C | D | E | F | G | H | I |
| DOV Proposal | n/a | n/a | n/a | n/a | n/a | 66.89 | 66.89 | n/a | n/a |
| Commitments | n/a | n/a | n/a | 958.16 | n/a | 952.84 | -5.31 | -0.6% | n/a |
| Portishead | 17.46 | 19.98 | 25.54 | 25.01 | -2.1% | 24.99 | -0.02 | -0.1% | -2.1% |
| Weston-super-mare | 328.92 | 376.72 | 481.10 | 445.51 | -7.4% | 444.69 | -0.81 | -0.2% | -7.6% |
| Other zone 6 | 68.17 | 78.17 | 99.84 | 97.78 | -2.1% | 97.71 | -0.07 | -0.1% | -2.1% |
| Frome | 58.98 | 67.36 | 83.99 | 83.24 | -0.9% | 83.21 | -0.03 | 0.0% | -0.9% |
| Shepton Mallet | 29.18 | 33.18 | 41.77 | 41.24 | -1.3% | 41.19 | -0.05 | -0.1% | -1.4% |
| Yeovil | 396.77 | 448.82 | 561.63 | 536.04 | -4.6% | 535.07 | -0.97 | -0.2% | -4.7% |
| Other zone 7 | 65.05 | 73.55 | 91.99 | 91.09 | -1.0% | 91.02 | -0.07 | -0.1% | -1.1% |
| Bridport | 39.01 | 43.70 | 54.26 | 53.23 | -1.9% | 53.18 | -0.05 | -0.1% | -2.0% |
| Dorchester | 162.42 | 182.55 | 227.51 | 213.19 | -6.3% | 212.93 | -0.26 | -0.1% | -6.4% |
| Weymouth | 126.80 | 142.28 | 176.95 | 165.66 | -6.4% | 165.46 | -0.20 | -0.1% | -6.5% |
| Other zone 8 | 5.00 | 5.61 | 6.84 | 6.84 | -1.9% | 6.83 | -0.01 | -0.1% | -2.0% |
| Bridgwater | 71.81 | 82.40 | 104.84 | 97.12 | -7.4% | 96.87 | -0.25 | -0.3% | -7.6% |
| Street | 43.16 | 49.32 | 62.38 | 61.44 | -1.5% | 61.34 | -0.09 | -0.2% | -1.7% |
| Wells | 28.00 | 32.12 | 40.89 | 40.14 | -1.8% | 40.02 | -0.12 | -0.3% | -2.1% |
| Clarks Village, Street | 43.93 | 50.10 | 63.15 | 59.55 | -5.7% | 58.99 | -0.56 | -0.9% | -6.6% |
| Other zone 9 | 54.67 | 62.71 | 79.79 | 78.34 | -1.8% | 78.19 | -0.14 | -0.2% | -2.0% |
| Minehead | 15.76 | 17.85 | 22.38 | 22.04 | -1.5% | 21.86 | -0.18 | -0.8% | -2.3% |
| Taunton | 426.89 | 485.76 | 611.69 | 574.34 | -6.1% | 565.63 | -8.72 | -1.5% | -7.5% |
| Other zone 10 | 32.06 | 36.42 | 45.75 | 45.06 | -1.5% | 44.73 | -0.33 | -0.7% | -2.2% |
| Chard | 24.15 | 27.39 | 34.52 | 33.94 | -1.7% | 33.59 | -0.35 | -1.0% | -2.7% |
| Exmouth | 28.40 | 32.31 | 40.73 | 40.01 | -1.8% | 39.54 | -0.47 | -1.2% | -2.9% |
| Honiton | 36.50 | 41.45 | 52.22 | 50.43 | -3.4% | 48.90 | -1.53 | -3.0% | -6.4% |
| Sidmouth | 30.24 | 34.33 | 43.22 | 41.88 | -3.1% | 41.31 | -0.57 | -1.4% | -4.4% |
| Other zone 11 | 41.03 | 46.59 | 58.71 | 56.63 | -3.6% | 55.91 | -0.72 | -1.3% | -4.8% |
| Cullompton | 8.08 | 9.19 | 11.56 | 11.36 | -1.7% | 10.79 | -0.57 | -5.0% | -6.7% |
| Tiverton | 48.02 | 54.67 | 68.67 | 66.32 | -3.4% | 62.41 | -3.91 | -5.9% | -9.1% |
| Other zone 12 | 0.94 | 1.08 | 1.36 | 1.33 | -1.9% | 1.28 | -0.05 | -3.9% | -5.7% |
| Barnstaple | 291.51 | 328.07 | 409.13 | 365.64 | -10.6% | 360.38 | -5.26 | -1.4% | -11.9% |
| Braunton | 3.87 | 4.33 | 5.34 | 5.26 | -1.5% | 5.17 | -0.10 | -1.9% | -3.3% |
| Ilfracombe | 3.74 | 4.19 | 5.17 | 5.09 | -1.5% | 5.00 | -0.09 | -1.9% | -3.3% |
| South Molton | 5.16 | 5.77 | 7.13 | 7.02 | -1.5% | 6.89 | -0.13 | -1.9% | -3.4% |
| Other zone 13 | 1.34 | 1.50 | 1.85 | 1.83 | -1.5% | 1.79 | -0.03 | -1.9% | -3.3% |
| Chulmleigh | 0.91 | 1.04 | 1.30 | 1.27 | -2.1% | 1.25 | -0.03 | -2.0% | -4.1% |
| Crediton | 16.70 | 18.97 | 23.82 | 23.29 | -2.2% | 22.80 | -0.49 | -2.1% | -4.3% |
| Other zone 14 | 0.38 | 0.43 | 0.54 | 0.52 | -4.5% | 0.51 | 0.00 | -0.8% | -5.2% |
| Exeter | 823.04 | 947.03 | 1,191.18 | 1,095.17 | -8.1% | 1,080.76 | -14.41 | -1.3% | -9.3% |
| Other zone 15 | 36.56 | 42.56 | 53.69 | 52.50 | -2.2% | 52.05 | -0.45 | -0.9% | -3.1% |
| Bideford | 28.40 | 32.42 | 41.15 | 39.10 | -5.0% | 38.95 | -0.16 | -0.4% | -5.3% |
| Holsworthy | 9.98 | 11.38 | 14.45 | 13.73 | -5.0% | 13.64 | -0.09 | -0.6% | -5.6% |
| Okehampton | 8.38 | 9.61 | 12.18 | 11.63 | -4.5% | 11.58 | -0.06 | -0.5% | -4.9% |
| Atlantic Village, Bideford | 8.22 | 9.30 | 11.69 | 10.87 | -7.0% | 10.66 | -0.21 | -1.9% | -8.8% |
| Other zone 16 | 13.18 | 14.99 | 18.96 | 18.09 | -4.6% | 17.97 | -0.12 | -0.7% | -5.2% |
| Dartmouth | 25.69 | 29.16 | 36.65 | 36.16 | -1.3% | 36.13 | -0.02 | -0.1% | -1.4% |
| Newton Abbott | 237.02 | 268.53 | 336.03 | 319.57 | -4.9% | 318.52 | -1.06 | -0.3% | -5.2% |
| Torquay | 212.84 | 240.57 | 300.93 | 287.80 | -4.4% | 287.18 | -0.62 | -0.2% | -4.6% |
| Other zone 17 | 101.74 | 114.95 | 143.83 | 142.19 | -1.1% | 142.05 | -0.14 | -0.1% | -1.2% |
| Ivybridge | 19.88 | 22.40 | 27.75 | 27.25 | -1.8% | 27.24 | -0.01 | 0.0% | -1.8% |
| Kingsbridge | 23.78 | 26.82 | 33.35 | 32.84 | -1.5% | 32.83 | -0.02 | 0.0% | -1.6% |
| Plymouth | 899.99 | 1,015.53 | 1,262.81 | 1,174.70 | -7.0% | 1,173.41 | -1.29 | -0.1% | -7.1% |
| Tavistock | 77.77 | 87.65 | 108.71 | 102.58 | -5.6% | 102.55 | -0.03 | 0.0% | -5.7% |
| Other zone 18 | 41.41 | 46.67 | 57.91 | 56.81 | -1.9% | 56.79 | -0.02 | 0.0% | -1.9% |
| Caerphilly | 59.80 | 67.56 | 84.33 | 82.20 | -2.5% | 82.18 | -0.02 | 0.0% | -2.5% |
| Cardiff | 808.84 | 915.24 | 1,142.45 | 1,100.66 | -3.7% | 1,099.74 | -0.92 | -0.1% | -3.7% |
| Cwmbran | 204.20 | 230.72 | 287.96 | 280.41 | -2.6% | 280.36 | -0.05 | 0.0% | -2.6% |
| Monmouth | 41.45 | 46.84 | 58.46 | 56.93 | -2.6% | 56.92 | -0.01 | 0.0% | -2.6% |
| Newport | 360.81 | 407.67 | 508.81 | 482.12 | -5.2% | 482.03 | -0.08 | 0.0% | -5.3% |
| Other zone 1 | 152.00 | 171.74 | 214.35 | 211.54 | -1.3% | 211.50 | -0.04 | 0.0% | -1.3% |
| Brislington | 53.52 | 61.62 | 78.56 | 75.30 | -4.2% | 75.29 | -0.01 | 0.0% | -4.2% |
| Bristol | 1,223.75 | 1,406.81 | 1,789.44 | 1,655.16 | -7.5% | 1,652.96 | -2.21 | -0.1% | -7.6% |
| Stroud | 71.07 | 81.84 | 104.33 | 100.00 | -4.2% | 99.99 | -0.02 | 0.0% | -4.2% |
| Yate | 105.68 | 121.67 | 155.02 | 148.68 | -4.1% | 148.66 | -0.02 | 0.0% | -4.1% |
| Cribbs Causeway, Bristol | 941.65 | 1,082.14 | 1,377.98 | 1,272.28 | -7.7% | 1,270.82 | -1.46 | -0.1% | -7.8% |
| Retail parks, Gloucester | 57.42 | 65.70 | 83.18 | 81.66 | -1.8% | 81.64 | -0.03 | 0.0% | -1.9% |
| Other zone 2 | 109.97 | 126.57 | 161.22 | 157.92 | -2.0% | 157.89 | -0.03 | 0.0% | -2.1% |
| Bath | 428.61 | 491.09 | 615.96 | 587.76 | -4.6% | 587.14 | -0.63 | -0.1% | -4.7% |
| Chippenham | 251.23 | 287.86 | 359.19 | 348.58 | -3.0% | 348.48 | -0.10 | 0.0% | -3.0% |
| Devizes | 37.72 | 43.15 | 53.72 | 52.91 | -1.5% | 52.88 | -0.03 | -0.1% | -1.6% |
| Trowbridge | 241.74 | 276.63 | 344.62 | 335.89 | -2.5% | 335.76 | -0.14 | 0.0% | -2.6% |
| Other zone 3 | 120.45 | 138.00 | 172.49 | 170.65 | -1.1% | 170.60 | -0.06 | 0.0% | -1.1% |
| Salisbury | 206.19 | 235.63 | 293.67 | 287.82 | -2.0% | 287.64 | -0.18 | -0.1% | -2.1% |
| Shaftesbury | 25.66 | 29.21 | 36.68 | 36.30 | -1.0% | 36.28 | -0.02 | 0.0% | -1.1% |
| Warminster | 56.43 | 64.50 | 80.29 | 79.18 | -1.4% | 79.13 | -0.05 | -0.1% | -1.4% |
| Other zone 4 | 46.78 | 53.49 | 66.69 | 66.21 | -0.7% | 66.18 | -0.04 | -0.1% | -0.8% |
| Bournemouth | 510.93 | 582.14 | 736.37 | 726.33 | -1.4% | 725.95 | -0.37 | -0.1% | -1.4% |
| Christchurch | 116.46 | 132.81 | 168.13 | 167.17 | -0.6% | 167.14 | -0.03 | 0.0% | -0.6% |
| Poole | 725.06 | 826.04 | 1,044.74 | 1,029.80 | -1.4% | 1,029.31 | -0.50 | 0.0% | -1.5% |
| Wimborne | 62.77 | 71.57 | 90.62 | 90.08 | -0.6% | 90.06 | -0.02 | 0.0% | -0.6% |
| Other zone 5 | 198.97 | 226.78 | 286.92 | 285.99 | -0.3% | 285.93 | -0.06 | 0.0% | -0.3% |
| Bodmin | 36.89 | 41.93 | 53.03 | 50.46 | -4.9% | 50.42 | -0.03 | -0.1% | -4.9% |
| Launceston | 57.19 | 64.90 | 81.75 | 77.23 | -5.5% | 77.16 | -0.07 | -0.1% | -5.6% |
| Liskeard | 28.26 | 32.06 | 40.38 | 38.42 | -4.9% | 38.39 | -0.02 | -0.1% | -4.9% |
| St Austell | 97.82 | 111.14 | 140.48 | 133.22 | -5.2% | 133.13 | -0.09 | -0.1% | -5.2% |
| Trago Mills, Liskeard | 28.42 | 32.27 | 40.60 | 38.93 | -4.1% | 38.89 | -0.04 | -0.1% | -4.2% |
| Other zone 19 | 49.55 | 56.30 | 71.11 | 69.22 | -2.7% | 69.16 | -0.05 | -0.1% | -2.7% |
| Outside Study Area | 6,773.78 | 7,725.62 | 9,718.99 | 9,636.68 | -0.8% | 9,628.43 | -8.25 | -0.1% | -0.9% |
| TOTAL | 19,414.92 | 22,128.72 | 27,841.50 | 27,841.50 | | 27,841.50 | -61.58 | | |

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Table 20: Design and Horizon Year Trading Levels with Commitments and DOV at 2025, 2029 and 2033

| | Base Year Turnover 2014 £M | Current Year Turnover 2018 £M | Design Year Turnover 2025 £M | Horizon Turnover 2029 £M | Horizon Turnover 2033 £M | % Current 2018 Turnover at 2025 | % Current 2018 Turnover at 2029 | % Current 2018 Turnover at 2033 |
|----------------------------|----------------------------------|-------------------------------------|------------------------------------|--------------------------------|--------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| COLUMN | A | B | C | D | E | F | G | H |
| DOV Proposal | n/a | n/a | 66.89 | 77.45 | 89.40 | n/a | n/a | n/a |
| Commitments | n/a | n/a | 952.84 | 1,105.87 | 1,279.26 | n/a | n/a | n/a |
| Portishead | 17.46 | 19.98 | 24.99 | 29.20 | 33.98 | 25.1% | 46.1% | 70.1% |
| Weston-super-mare | 328.92 | 376.72 | 444.69 | 518.74 | 602.78 | 18.0% | 37.7% | 60.0% |
| Other zone 6 | 68.17 | 78.17 | 97.71 | 114.10 | 132.73 | 25.0% | 46.0% | 69.8% |
| Frome | 58.98 | 67.36 | 83.21 | 96.07 | 110.57 | 23.5% | 42.6% | 64.1% |
| Shepton Mallet | 29.18 | 33.18 | 41.19 | 47.68 | 55.06 | 24.1% | 43.7% | 65.9% |
| Yeovil | 396.77 | 448.82 | 535.07 | 617.89 | 711.98 | 19.2% | 37.7% | 58.6% |
| Other zone 7 | 65.05 | 73.55 | 91.02 | 105.08 | 121.06 | 23.8% | 42.9% | 64.6% |
| Bridport | 39.01 | 43.70 | 53.18 | 61.20 | 70.30 | 21.7% | 40.1% | 60.9% |
| Dorchester | 162.42 | 182.55 | 212.93 | 245.61 | 282.66 | 16.6% | 34.5% | 54.8% |
| Weymouth | 126.80 | 142.28 | 165.46 | 190.74 | 219.40 | 16.3% | 34.1% | 54.2% |
| Other zone 8 | 5.00 | 5.61 | 6.83 | 7.86 | 9.04 | 21.8% | 40.2% | 61.1% |
| Bridgwater | 71.81 | 82.40 | 96.87 | 112.69 | 130.59 | 17.6% | 36.8% | 58.5% |
| Street | 43.16 | 49.32 | 61.34 | 71.18 | 82.32 | 24.4% | 44.3% | 66.9% |
| Wells | 28.00 | 32.12 | 40.02 | 46.57 | 53.99 | 24.6% | 45.0% | 68.1% |
| Clarks Village, Street | 43.93 | 50.10 | 58.99 | 68.37 | 78.99 | 17.7% | 36.5% | 57.7% |
| Other zone 9 | 54.67 | 62.71 | 78.19 | 90.99 | 105.48 | 24.7% | 45.1% | 68.2% |
| Minehead | 15.76 | 17.85 | 21.86 | 25.28 | 29.17 | 22.5% | 41.6% | 63.4% |
| Taunton | 426.89 | 485.76 | 565.63 | 655.23 | 756.96 | 16.4% | 34.9% | 55.8% |
| Other zone 10 | 32.06 | 36.42 | 44.73 | 51.75 | 59.73 | 22.8% | 42.1% | 64.0% |
| Chard | 24.15 | 27.39 | 33.59 | 38.96 | 45.03 | 22.6% | 42.2% | 64.4% |
| Exmouth | 28.40 | 32.31 | 39.54 | 45.89 | 53.07 | 22.4% | 42.0% | 64.3% |
| Honiton | 36.50 | 41.45 | 48.90 | 56.68 | 65.48 | 18.0% | 36.7% | 58.0% |
| Sidmouth | 30.24 | 34.33 | 41.31 | 47.90 | 55.34 | 20.3% | 39.5% | 61.2% |
| Other zone 11 | 41.03 | 46.59 | 55.91 | 64.85 | 74.96 | 20.0% | 39.2% | 60.9% |
| Cullompton | 8.08 | 9.19 | 10.79 | 12.49 | 14.42 | 17.5% | 36.0% | 56.9% |
| Tiverton | 48.02 | 54.67 | 62.41 | 72.16 | 83.22 | 14.2% | 32.0% | 52.2% |
| Other zone 12 | 0.94 | 1.08 | 1.28 | 1.48 | 1.71 | 18.4% | 37.2% | 58.3% |
| Barnstaple | 291.51 | 328.07 | 360.38 | 415.56 | 477.99 | 9.8% | 26.7% | 45.7% |
| Braunton | 3.87 | 4.33 | 5.17 | 5.93 | 6.81 | 19.4% | 37.2% | 57.3% |
| Ilfracombe | 3.74 | 4.19 | 5.00 | 5.74 | 6.59 | 19.4% | 37.2% | 57.3% |
| South Molton | 5.16 | 5.77 | 6.89 | 7.92 | 9.08 | 19.4% | 37.3% | 57.4% |
| Other zone 13 | 1.34 | 1.50 | 1.79 | 2.06 | 2.36 | 19.4% | 37.2% | 57.3% |
| Chulmleigh | 0.91 | 1.04 | 1.25 | 1.45 | 1.67 | 20.4% | 39.4% | 60.6% |
| Crediton | 16.70 | 18.97 | 22.80 | 26.40 | 30.39 | 20.2% | 39.1% | 60.2% |
| Other zone 14 | 0.38 | 0.43 | 0.51 | 0.60 | 0.69 | 20.0% | 39.4% | 61.2% |
| Exeter | 823.04 | 947.03 | 1,080.76 | 1,254.45 | 1,449.87 | 14.1% | 32.5% | 53.1% |
| Other zone 15 | 36.56 | 42.56 | 52.05 | 60.59 | 70.19 | 22.3% | 42.4% | 64.9% |
| Bideford | 28.40 | 32.42 | 38.95 | 45.27 | 52.40 | 20.2% | 39.7% | 61.6% |
| Holsworthy | 9.98 | 11.38 | 13.64 | 15.85 | 18.35 | 19.9% | 39.3% | 61.2% |
| Okehampton | 8.38 | 9.61 | 11.58 | 13.46 | 15.58 | 20.5% | 40.1% | 62.2% |
| Atlantic Village, Bideford | 8.22 | 9.30 | 10.66 | 12.35 | 14.27 | 14.6% | 32.8% | 53.4% |
| Other zone 16 | 13.18 | 14.99 | 17.97 | 20.85 | 24.11 | 19.9% | 39.2% | 60.9% |
| Dartmouth | 25.69 | 29.16 | 36.13 | 41.87 | 48.38 | 23.9% | 43.6% | 65.9% |
| Newton Abbott | 237.02 | 268.53 | 318.52 | 368.40 | 424.86 | 18.6% | 37.2% | 58.2% |
| Torquay | 212.84 | 240.57 | 287.18 | 332.07 | 382.91 | 19.4% | 38.0% | 59.2% |
| Other zone 17 | 101.74 | 114.95 | 142.05 | 164.24 | 189.37 | 23.6% | 42.9% | 64.7% |
| Ivybridge | 19.88 | 22.40 | 27.24 | 31.42 | 36.12 | 21.6% | 40.3% | 61.3% |
| Kingsbridge | 23.78 | 26.82 | 32.83 | 37.89 | 43.61 | 22.4% | 41.3% | 62.6% |
| Plymouth | 899.99 | 1,015.53 | 1,173.41 | 1,355.63 | 1,561.05 | 15.5% | 33.5% | 53.7% |
| Tavistock | 77.77 | 87.65 | 102.55 | 118.31 | 136.05 | 17.0% | 35.0% | 55.2% |
| Other zone 18 | 41.41 | 46.67 | 56.79 | 65.53 | 75.36 | 21.7% | 40.4% | 61.5% |
| Caerphilly | 59.80 | 67.56 | 82.18 | 94.94 | 109.40 | 21.6% | 40.5% | 61.9% |
| Cardiff | 809.84 | 915.24 | 1,099.74 | 1,272.29 | 1,467.90 | 20.2% | 39.0% | 60.4% |
| Cwmbran | 204.20 | 230.72 | 280.36 | 323.79 | 373.05 | 21.5% | 40.3% | 61.7% |
| Monmouth | 41.45 | 46.84 | 56.92 | 65.73 | 75.73 | 21.5% | 40.3% | 61.7% |
| Newport | 360.81 | 407.67 | 482.03 | 556.70 | 641.39 | 18.2% | 36.6% | 57.3% |
| Other zone 1 | 152.00 | 171.74 | 211.50 | 244.27 | 281.42 | 23.2% | 42.2% | 63.9% |
| Brislington | 53.52 | 61.62 | 75.29 | 87.87 | 102.22 | 22.2% | 42.6% | 65.9% |
| Bristol | 1,223.75 | 1,406.81 | 1,652.96 | 1,926.44 | 2,237.68 | 17.5% | 36.9% | 59.1% |
| Stroud | 71.07 | 81.84 | 99.99 | 116.70 | 135.76 | 22.2% | 42.6% | 65.9% |
| Yate | 105.68 | 121.67 | 148.66 | 173.46 | 201.73 | 22.2% | 42.6% | 65.8% |
| Cribbs Causeway, Bristol | 941.65 | 1,082.14 | 1,270.82 | 1,481.74 | 1,721.81 | 17.4% | 36.9% | 59.1% |
| Retail parks, Gloucester | 57.42 | 65.70 | 81.64 | 94.78 | 109.70 | 24.3% | 44.3% | 67.0% |
| Other zone 2 | 109.97 | 126.57 | 157.89 | 184.22 | 214.22 | 24.8% | 45.6% | 69.3% |
| Bath | 428.61 | 491.09 | 587.14 | 679.90 | 784.81 | 19.6% | 38.4% | 59.8% |
| Chippenham | 251.23 | 287.86 | 348.48 | 402.89 | 464.06 | 21.1% | 40.0% | 61.2% |
| Devizes | 37.72 | 43.15 | 52.88 | 60.88 | 69.95 | 22.6% | 41.1% | 62.1% |
| Trowbridge | 241.74 | 276.63 | 335.76 | 387.33 | 445.48 | 21.4% | 40.0% | 61.0% |
| Other zone 3 | 120.45 | 138.00 | 170.60 | 197.33 | 227.45 | 23.6% | 43.0% | 64.8% |
| Salisbury | 206.19 | 235.63 | 287.64 | 331.17 | 380.62 | 22.1% | 40.5% | 61.5% |
| Shaftesbury | 25.66 | 29.21 | 36.28 | 42.01 | 48.50 | 24.2% | 43.8% | 66.0% |
| Warminster | 56.43 | 64.50 | 79.13 | 90.97 | 104.43 | 22.7% | 41.0% | 61.9% |
| Other zone 4 | 46.78 | 53.49 | 66.18 | 76.21 | 87.60 | 23.7% | 42.5% | 63.8% |
| Bournemouth | 510.93 | 582.14 | 725.95 | 844.08 | 978.00 | 24.7% | 45.0% | 68.0% |
| Christchurch | 116.46 | 132.81 | 167.14 | 194.52 | 225.57 | 25.8% | 46.5% | 69.8% |
| Poole | 725.06 | 826.04 | 1,029.31 | 1,197.11 | 1,387.35 | 24.6% | 44.9% | 68.0% |
| Wimborne | 62.77 | 71.57 | 90.06 | 104.81 | 121.54 | 25.8% | 46.4% | 69.8% |
| Other zone 5 | 198.97 | 226.78 | 285.93 | 332.69 | 385.71 | 26.1% | 46.7% | 70.1% |
| Bodmin | 36.89 | 41.93 | 50.42 | 58.59 | 67.81 | 20.3% | 39.7% | 61.7% |
| Launceston | 57.19 | 64.90 | 77.16 | 89.50 | 103.43 | 18.9% | 37.9% | 59.4% |
| Liskeard | 28.26 | 32.06 | 38.39 | 44.54 | 51.49 | 19.8% | 38.9% | 60.6% |
| St Austell | 97.82 | 111.14 | 133.13 | 154.62 | 178.93 | 19.8% | 39.1% | 61.0% |
| Trago Mills, Liskeard | 28.42 | 32.27 | 38.89 | 45.10 | 52.11 | 20.5% | 39.7% | 61.5% |
| Other zone 19 | 49.55 | 56.30 | 69.16 | 80.30 | 92.89 | 22.8% | 42.6% | 65.0% |
| Outside Study Area | 6,773.78 | 7,725.62 | 9,628.43 | 11,165.37 | 12,907.04 | 24.6% | 44.5% | 67.1% |
| TOTAL | 19,414.92 | 22,128.72 | 27,841.50 | 31,103.35 | 35,954.85 | | | |

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APPENDIX B: TOWN CENTRE HEALTH CHECKS

| Affinity Devon (formerly Atlantic Village), Bideford | |
|---|--|
| Diversity of Uses | <p>Affinity Devon has a total of 54 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 41 (75.9%); <ul style="list-style-type: none"> Comparison: 37 (68.5%); Convenience: 4 (7.4%); Service/ other: 0 (0%); Professional and Financial Services (A2): 0 (0%); Restaurant and Hot Food Takeaway (A3 and A5): 4 (7.5%); Drinking Establishments (A4): 2 (3.7%); Offices (B1): 0 (0%); General Industrial (B2): 0 (0%); Hotels (C1): 1 (1.9%); Dwelling Houses (C3): 0 (0%); Non-residential Institutions (D1): 6 (4.5%); Assembly and Leisure (D2): 1 (1.9%); and Other (Sui Generis): 3 (5.6%). <p>The centre predominantly comprises national outlet retailers.</p> |
| Proportion of vacant street level property | Vacant units 2 (3.7%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 8.25%. Range: 7.5%-8.5%. Comments: U+I sold the Atlantic Village Outlet in November 2017 to Global Mutual for £13m, an investment that reflects a Net Initial Yield of 8.25%. The recent sale indicates strong investor demand. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant outlet retailer representation: Marks & Spencer, Nike, Peacocks, GAP, Edinburgh Woollen Mill, Trespass, Cadbury, Saltrock, Mountain Warehouse, The Works, Holland & Barrett, Costa. Notable recent retailer additions (last 12 months): None. Plans have been submitted for a new 24,000 sq. ft. B&M Bargain Store on Clovelly Road, between Affinity and Clovelly Road Industrial Estate. Notable recent retailer closures: None. Notable published retailer requirements: The Fragrance Shop, Pets at Home, Poundworld. |
| Commercial rents | <ul style="list-style-type: none"> The retail operators are trading under turnover leases outside of the Landlord and Tenant Act 1954. Former letting agents and the current landlords are unwilling to reveal these figures but confirm that they vary from tenant to tenant and from trade to trade. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Approximately 45,000 visitors per week. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 75, 75A, 75B. Group coach visits are advertised on the Affinity Devon website. Rail: The nearest train station is Barnstaple, approximately 12 miles away. Services run to Exeter St David's and Exmouth. Car parking: c. 700 on-site car parking spaces, along with coach parking facilities. Walking/cycling: Residential cluster to the east of the site. Secure cycling facilities within Affinity Devon. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 111 crimes were reported in the Bideford West policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |
| Comparison to previous health checks | The vacancy rate is lower than that shown by CBRE in their 2016 assessment. |

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|----------------------|---|
| Health Check Summary | The vacancy rate is below the national average; there is representation from major retailers, and strong investment activity. The wider retail and leisure expansion around the centre indicates a consistent and strong occupier demand from retailers and food & beverage operators. The scheme is vital and viable. It is healthy. |
|----------------------|---|

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

Sources:

Inspection

Local Agents: McArthur Wilson, JD Commercial, Webbers.

Current owners: Global Mutual

CBRE Report on town health checks August 2016

National average vacancy rate obtained from the House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Bideford Town Centre

| | |
|---|---|
| Diversity of Uses | <p>The centre has a total of 344 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 157 (45.6%); <ul style="list-style-type: none"> Comparison: 114 (33.1%); Convenience: 10 (2.9%); Service/other: 33 (9.6%); Financial and Professional Services (A2): 27 (7.8%); Restaurant and Hot Food Takeaway (A3 and A5): 39 (11.3%); Drinking Establishments (A4): 8 (2.3%); Offices (B1): 22 (6.4%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 38 (11%); Non-residential Institutions (D1): 18 (5.2%); Assembly and Leisure (D2): 1 (0.3%); and Other (Sui Generis): 9 (2.6%). <p>The main area is around the High Street. The town centre has a mix of national multiples and independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 25 (7.3%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6%. Range: 7.5%-10%. Comments: 79 High Street was sold in August 2016 for £322,000, reflecting a Net Initial Yield of 6%. The unit is let to Vision Express on a 10-year term starting March 2016. Investment sales have predominantly been small, ground floor retail properties of around 500-1,000 sq. ft. with residential above. Demand is relatively strong, and there have been several market transactions in the last 18 months. The centre is achieving expected yields for a town of this size. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Card Factory, Vision Express, New Look, Boots, Co-operative Food. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: None. The New Look branch is not on the current CVA closure list. Notable published retailer requirements: The Fragrance Shop, Pets at Home, Poundworld. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £25 psf ITZA. Range: £15-£25 psf ITZA. Comments: Zone A rents reach around £25 psf ITZA on prime retail pitches, and drops to around £15 psf ITZA within secondary retail parades. 8 High Street was let in June 2017 on a 5-year term for a rent that equates to £19.57 psf ITZA. 7 High Street was let in April 2018 on confidential terms at a rent equating to c. £25 psf ITZA. The area is achieving expected Zone A rental values. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: High around Mill Street and Cooper Street. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 14, 21, 21A, 75, 75A, 75B, 85, 118, 319, 372, 641, 815, 821, 921. Rail: The nearest train station is Barnstaple, located approximately 10 miles to the north east. Services run to Exeter St David's and Exmouth. Car parking: Four car parks (Pannier Market, Bridge Street, The Quay and Manor), with limited on-street parking elsewhere. Walking/cycling: Near residential neighbourhoods. Mill Street and Cooper Street are pedestrianised. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 111 crimes were reported in the Bideford West policing neighbourhood in May 2018. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Comparison to previous health checks | The vacancy rate is lower than that shown by CBRE in their 2016 assessment. |
| Health Check Summary | The vacancy rate is below the national average and has fallen since CBRE's study of 2016. There is a diversity of uses and occupiers. It is accessible by a choice of transport modes, and is generally in a good state of repair. It is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Local agent: JD Commercial, Webbers.

CBRE Report on town health checks August 2016

National average vacancy rate obtained from the House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Barnstaple Town Centre | |
|---|--|
| Diversity of Uses | <p>The centre has a total of 526 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 287 (54.6%); <ul style="list-style-type: none"> Comparison: 185 (35.2%); Convenience: 18 (3.4%); Service/other: 84 (16%); Financial and Professional Services (A2): 20 (3.8%); Restaurant and Hot Food Takeaway (A3 and A5): 77 (14.7%); Drinking Establishments (A4): 8 (1.5%); Offices (B1): 17 (3.2%); General Industrial (B2): 1 (0.2%); Hotels (C1): 2 (0.4%); Dwelling Houses (C3): 15 (2.9%); Non-residential Institutions (D1): 17 (3.2%); Assembly and Leisure (D2): 4 (0.8%); and Other (Sui Generis): 10 (1.9%). <p>The town centre has a mix of national multiple and independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 68 (12.9%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 5.8%. Range: 5.8%-8%. Comments: 72 High Street was purchased as an investment in January 2018 for £1.94m, reflecting a Net Initial Yield of 5.82%. This is regarded as a prime retail pitch investment, and is let to JD Sports on 10-year straight term starting October 2016. The town is performing well on commercial investments, with yields falling below 6% on prime investment opportunities. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Lidl (hoping to relocate their town centre store), Halfords, Curry's PC World, Pandora, Wilko, Waterstones, Next, River Island, Marks & Spencer, WHSmith. Notable recent retailer additions (last 12 months): Deichmann Shoes. Notable recent retailer closures: Prezzo (CVA closure list), Jones Bootmakers, EE Store. The New Look branch is not on the current CVA closure list. Notable published retailer requirements: Cats Protection, The Fragrance Shop, Lidl, Savers, Cotton Traders, Buyology, Poundworld. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £115 psf ITZA. Range: £25-£115 psf ITZA. Comments: Rents are typically around £60 psf ITZA in the Green Lanes Shopping Centre, and £100 psf ITZA in prime areas. The letting of 75 High Street (a prime location) to JD Sports in 2016 equates to £115 psf ITZA. The area is performing well in terms of Zone A rates. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Strong around the High Street, Joy Street, Butchers Row and the Green Lanes Shopping Centre. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 5B, 9, 10, 10A, 11C, 15A, 19, 21, 21A, 71, 72, 75B, 85, 118, 155, 301, 303, 309, 310, 319, 325, 372, 386, 646, 658, 815, 821, 903 and 921. Rail: Barnstaple Train Station is approximately 500 to the west of the town centre. Services run to Exeter St David's and Exmouth. Car parking: There are two car parks close to the centre (Cattle Market and Bear Street), with limited on-street car parking elsewhere. There is also a car park at the Railway Station. Walking/cycling: Near residential neighbourhoods. The High Street is pedestrianised between Joy Street and Butchers Row. |

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| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> • CCTV: In place. • General: 179 crimes were reported in the Barnstaple Central Town policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good on the High Street and within Green Lanes Shopping Centre. • Graffiti: Limited in this area. |
| Comparison to previous health check | The vacancy rate is similar to that shown by CBRE in their 2016 assessment. |
| Health Check Summary | While the vacancy rate is a little higher than the national average, the percentage has remained consistent in the past few years, and Zone A rentals are good. It is accessible, there is a good diversity of uses, a range of significant national multiples in occupation, and further interest from additional retailers. It is a generally robust centre. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Local agent: JD Commercial, Webbers, John Smale & Co.

National Agents: Montagu Evans, Savills.

CBRE Report on town health checks August 2016

National average vacancy rate obtained from the House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Taunton Town Centre | |
|---|---|
| Diversity of Uses | <p>The centre has 704 units in total comprising:</p> <ul style="list-style-type: none"> Retail (A1): 353 (50.1%); <ul style="list-style-type: none"> Comparison: 241 (34.2%); Convenience: 22 (3.1%); Service/other: 90 (12.8%); Financial and Professional Services (A2): 52 (7.4%); Restaurant and Hot Food Takeaway (A3 and A5): 87 (12.4%); Drinking Establishments (A4): 14 (2%); Offices (B1): 19 (2.7%); General Industrial (B2): 4 (0.6%); Hotels (C1): 1 (0.1%); Dwelling Houses (C3): 79 (11.2%); Non-residential Institutions (D1): 22 (3.1%); Assembly and Leisure (D2): 5 (0.7%); and Other (Sui Generis): 18 (2.6%). <p>The primary areas are the High Street and the Orchard Shopping Centre.</p> |
| Proportion of vacant street level property | Vacant units 50 (7.1%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 5.75%. Range: 5.75-10%. Comments: 40-42 Fore Street was sold in January 2018 for £4.895m, reflecting a Net Initial Yield of 5.75%. The premises are let to TK Maxx until December 2031 with rent reviews every 5 years. 41-44 North Street was sold in April 2018 for £3.52m reflecting a Net Initial Yield of 7.16%. The units are let to Poundworld on 10-year straight lease, and to Snap Fitness on a 15-year straight lease. The town is performing well from an investment perspective with prime yields below 6%, and strong investor demand. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Primark, Sports Direct, Argos, Marks & Spencer. Notable recent retailer additions (last 12 months): Warrens Bakery in Orchard Shopping Centre. Notable recent retailer closures: Prezzo (CVA closure list). The New Look branch is not on the current CVA closure list. Notable published retailer requirements: Cats Protection, American Golf, Sofology, Jigsaw, Between the Lines, Machine Mart, Mind, Oasis, Buyology. |
| Commercial rents | <ul style="list-style-type: none"> Prime: 120 psf ITZA. Range: £60-£120 psf ITZA. Comments: TK Maxx recently signed a new lease, agreed at £300,000 per annum. Fore Street is the prime pitch in the town with rents averaging £100 psf ITZA. Rates in Orchard Shopping Centre start at around £60 psf ITZA. Zone A rents in the town are performing better than expected. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: High around St James Street, North Street, and within the Orchard Shopping Centre. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 1, 2, 2a, 4, 9, 10c, 20, 21, 22, 22a, 22b, 23, 23b, 25, 28, 29, 30, 51, 54, 96c, 97, 98, 99, 387, 625, 755. Rail: Taunton Station is to the north. Services run to Paignton, Cardiff Central, Plymouth and London Paddington. Car Parking: Multiple car parks in central locations, including Belvedere Road and Kilkenny. Walking/cycling: Near residential neighbourhoods. A scheme to pedestrianise stretches of road in the town centre is set to be implemented later in 2018. The High Street is pedestrianised. |

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| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> • CCTV: In place. • General: 353 crimes were reported in the Taunton Central policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good on High Street, Cheapside, North Street, and within the Orchard Shopping Centre. • Graffiti: Some graffiti in the area. |
| Comparison to previous health check | The vacancy rate is similar to that shown by CBRE in their 2016 assessment. |
| Health Check Summary | Taunton is well represented by major retailers, with vacancy rates below the national average. Vacant units tend to be larger and harder to fill as many major operators are already in situ. There is demand from start-up/independent traders, and transactional evidence in the past 18-24 months indicates that there is growth. The centre is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies. The current area of search has been taken from the Town Centre Boundary as defined in the 2010 Taunton Deane Borough Council Retail and Leisure Study, prepared by Roger Tym & Partners.

Sources:

Inspection

Local agents: Greenslade Taylor Hunt, Eden May, Humberts.

National agents: KLM.

CBRE Report on town health checks August 2016

National average vacancy rate obtained from the House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

Sidmouth Town Centre

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|---|---|
| Diversity of Uses | <ul style="list-style-type: none"> The centre has a total of 210 units comprising: Retail (A1): 147 (70%); <ul style="list-style-type: none"> Comparison: 120 (57.1%); Convenience: 7 (3.3%); Service/other: 20 (9.5%); Financial and Professional Services (A2): 15 (7.1%); Restaurant and Hot Food Takeaway (A3 and A5): 20 (9.5%); Drinking Establishments (A4): 4 (1.9%); Offices (B1): 4 (1.9%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 9 (4.3%); Non-residential Institutions (D1): 2 (1%); Assembly and Leisure (D2): 1 (0.5%); and Other (Sui Generis): 2 (1%). <p>The main retail offer is along the High Street. Occupiers are predominantly independent traders, and there are national multiple retailers.</p> |
| Proportion of vacant street level property | Vacant units 6 (2.9%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6%. Range: 6%-9%. Comments: 4-6 Fore Street was sold in November 2016 for £1.25m reflecting a Net Initial Yield of 7.4%. The units are let on FRI leases: 4-5 Fore Street to Fat Face (expiring September 2020); 5-6 Fore Street to Mountain Warehouse (expiring January 2021). 19 Fore Street was sold recently for £320,500 (above the asking price of £295,000). The property is let to Cancer Research UK on an FRI lease until 2022 at a rate of £18,250 per annum, which reflects a Net Initial Yield of 6%. Recent investment sales are achieving expected yields for a centre like Sidmouth. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Holland & Barrett, Boots, Fat Face, Saltrock, Crew. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: New Look (CVA closure list). Notable published retailer requirements: Lidl, Superdrug, Savers, Cotton Traders, Clintons. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £55 psf ITZA. Range: £40-£55 psf ITZA. Comments: 23 Fore Street has recently been let at a rent equating to £55 psf ITZA. 50 Fore Street was let in August 2016 on a 10-year term to Saltrock for £18,500 per annum (asking price: £19,500). The rent was valued on an overall basis as it was essentially 2 interconnected units and difficult to zone. Prime Zone A rents indicate that the town is performing above expected levels. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Pedestrian flows are good around Fore Street and High Street. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 9, 9A, 56b, 157, 382, 387, 899, Sidmouth Hopper service. Rail: The nearest train station is Honiton, approximately 8.4 miles to the northeast. Services run to Exeter St David's and London Waterloo. Car parking: Two car parks in town centre (Bedford and Roxburgh). There are two smaller car parks west of the town centre. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: CCTV in Sidmouth not monitored but can be retrieved by the police in the event of an incident. General: 70 crimes were reported in the Sidmouth policing neighbourhood in May 2018. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Comparison to previous health check | GVA's 2017 assessment finds that the vacancy rate has fallen steadily since 2011. The current vacancy rate is similar to that shown by GVA for the year 2016, and is well below the national average. |
| Health Check Summary | Zone A rents are higher than similar sized towns in the area, with strong investor demand. The vacancy rate is well below the national average. The centre is robust, stable, and in excellent health. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Local agents: Downing Bentley Retail.

The Greater Exeter Town Centre and Retail Study, prepared by GVA in September 2017

National average vacancy rate obtained from the House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

Exeter City Centre

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| Diversity of Uses | <p>The centre has a total of 563 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 339 (60.2%); <ul style="list-style-type: none"> Comparison: 237 (42.1%); Convenience: 20 (3.6%); Service/other: 82 (14.6%); Financial and Professional Services (A2): 26 (4.6%); Restaurant and Hot Food Takeaway (A3 and A5): 94 (16.7%); Drinking Establishments (A4): 12 (2.1%); Offices (B1): 4 (0.7%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 2 (0.4%); Non-residential Institutions (D1): 12 (2.1%); Assembly and Leisure (D2): 4 (0.7%); and Other (Sui Generis): 16 (2.8%). <p>There are many national multiples in the town, along with independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 54 (9.6%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 5%. Range: 5%-10%. Comments: 32-35 High Street was acquired by DTZ Investors (for Legal & General) in December 2017 for £9.15m. The premises are let to House of Fraser until 2038 (not on the current CVA closure list). The sale price reflects a Net Initial Yield of 5.03%. 12 Sidwell Street was sold at auction for £1.3m in August 2016. Sainsbury's are a sitting tenant until 2023, and the current rent is £113,902 per annum. The sale reflected a Gross Initial Yield of 8.71%. There is a wide range of yields in the town, led in part by low yielding transactions that indicate high investment demand in Exeter. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Primark, Debenhams, John Lewis, Jigsaw, H. Samuel, Urban Outfitters, Topshop, Boots, Waterstones, Sports Direct, Pizza Express, Côte Brasserie, Sainsbury's, Tesco Metro, Marks & Spencer, Wagamama, Nando's, Café Rouge. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: Polpo Restaurant. The Intersport in Guildhall Shopping Centre was having a closing down sale at the time of inspection. The New Look branch is on the current CVA closure list, Prezzo Exeter is not. Notable published retailer requirements: Hawkins Bazaar, Cats Protection, Lush Cosmetics, Sofology, The Fragrance Shop, Lidl, Savers, Mind, Slater Menswear, Krispy Kreme, Buyology, Red5, Poundworld. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £210 psf ITZA. Range: £80-£210 psf ITZA. Comments: 1-2 Catherine Street (secondary location) was let in January 2018 to Loake (trading as Brogue Trader) for £42,500, equating to c. £80 psf ITZA. Prime Zone A on the High Street is around £195 psf ITZA; rates in the Princesshay Shopping Centre are £200-£210 psf ITZA. A unit in Princesshay Shopping Centre was let this year at £211 psf ITZA; a national agent states that they have five good offers on a unit in the Princesshay. Recent Starbucks and Monsoon re-gears reflect rents of £184 psf ITZA and £194 psf ITZA respectively. Zone A rents in the town are performing very well, with future growth expected. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: High pedestrian flows on High Street, Sidwell Street, Queen Street and Princesshay Shopping Centre. |

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| Accessibility | <ul style="list-style-type: none"> • Bus routes: 6, 6a, 123, 173, 359, 360, 366, 976, A, B, E, F1, F2, P, J, K, M, R, T, D, H, Green. • Rail: There are three train stations in Exeter: St David's, Central and St Thomas. Services run to Paignton, Exmouth, London (Paddington & Waterloo), Barnstaple and Plymouth. • Car parking: Over 10 car parks in the centre of town, and several in surrounding areas. • Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> • CCTV: In place. • General: 345 crimes were reported in the Exeter City Centre policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Comparison to previous health check | The report by GVA in 2017 indicates that the vacancy rate has fallen steadily in recent years. At the time of its findings, GVA's report found that the vacancy rate was lower than levels reported prior to the financial crisis in 2007. The current vacancy rate is similar to that shown by CBRE in their 2016 assessment. |
| Health Check Summary | The vacancy rate has fallen steadily in recent years, and is currently below the national average. Values have grown, and demand is consistently strong. The centre is highly accessible and offers a pleasant environment. It is vital and viable. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs unless otherwise stated.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Local agents: Stratton Creber Commercial.

National agents: Allsop, Jackson Criss, Lunson Mitchenall.

CBRE Report on town health checks August 2016

Exeter & West End of East Devon Retail & Leisure Study, prepared by Bilfinger GVA in December 2016

National average vacancy rate obtained from House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

Exmouth Town Centre

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| Diversity of Uses | <p>The centre has a total of 345 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 172 (49.9%); <ul style="list-style-type: none"> Comparison: 100 (29%); Convenience: 12 (3.5%); Service/other: 60 (17.4%); Financial and Professional Services (A2): 37 (10.7%); Restaurant and Hot Food Takeaway (A3 and A5): 47 (13.6%); Drinking Establishments (A4): 10 (2.9%); Offices (B1): 8 (2.3%); General Industrial (B2): 1 (0.3%); Hotels (C3): 0 (0%); Dwelling Houses C3: 35 (10.1%); Non-residential Institutions (D1): 8 (2.3%); Assembly and Leisure (D2): 3 (0.9%); and Other (Sui Generis): 12 (3.5%). <p>There are many national multiples represented in the town along with independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 12 (3.5%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 4.75%. Range: 6%-9%. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Sports Direct, Caffè Nero, Peacocks, Greggs, Costa, Superdrug. Notable recent retailer additions (last 12 months): The Children's Society. Notable recent retailer closures: Roomers Kitchen Remodelers. The Prezzo and New Look branches are not on the current CVA closure list. Notable published retailer requirements: The Works, Pavers. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £40 psf ITZA. Range: £25-£40 psf ITZA. Comments: 28 The Parade was let in May 2018 to The Children's Society on a 6-year term for £14,500 per annum, equating to £28 psf ITZA. The town is performing as expected on recently achieved Zone A rents. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Moderate pedestrian flows on The Parade and Rolle Street. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 7, 56, 56A, 57 Gold, 57B, 58, 59x, 96, 98, 99E, 157, 357, KINGS1. Rail: Exmouth Train Station is immediately northwest of the centre. Services run to Paignton, Exeter St David's and Barnstaple. Car parking: There are two car parks to the north and west next to the train station and the leisure centre respectively. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 117 crimes were reported in the Exmouth Town policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |
| Comparison to previous health check | GVA's 2017 assessment finds that vacancy rates have fallen by 4% over the period 2011-2016, and shows that the vacancy rate was 5.5% in the year 2016. The current level indicates that it has dropped further, and remains well below the national average. |

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| Health Check Summary | Prime yields and Zone A rents are good. The centre has a wide diversity of uses, and a vacancy rate below the national average. It is accessible, and offers a generally pleasing environment. The centre is historically robust and stable. It is healthy. |
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Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

National agents: MMX Retail, Meadows.

The Greater Exeter Town Centre and Retail Study, prepared by GVA in September 2017

National average vacancy rate obtained from House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

Street Town Centre

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| Diversity of Uses | <p>Clarks Village (DOV) is adjacent to Street town centre. Excluding the DOV, the centre has a total of 136 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 75 (55.1%); <ul style="list-style-type: none"> Comparison: 40 (29.4%); Convenience: 8 (5.9%); Service/other: 27 (19.9%); Financial and Professional Services (A2): 16 (11.8%); Restaurant and Hot Food Takeaway (A3 and A5): 10 (7.3%); Drinking Establishments (A4): 1 (0.7%); Offices (B1): 1 (0.7%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 5 (3.7%); Non-residential Institutions (D1): 8 (5.9%); Assembly and Leisure (D2): 1 (0.7%); and Other (Sui Generis): 3 (2.2%). <p>Several national multiples are represented in the town, along with independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 16 (11.8%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6%. Range: 6-10.95%. Comments: 90 High Street is currently under offer at just under the asking price of £275,000, reflecting a Net Initial Yield of c. 7.77%. The property is let to CEX on a 10-year lease (expiring October 2026) at £19,000 per annum. 88 High Street was sold at auction in July 2017 for £315,000, reflecting a Net Initial Yield of 10.95%. It is let to New Look on a 15-year lease (expiring September 2019) at £37,700 per annum. Local agents consider the property to be heavily over-rented, and have described the investment market as buoyant. There is demand for both small investment opportunities; and prime, well configured units for regional and local occupiers. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Sports Direct, Next, Boots, Peacocks, WHSmith, The Works, Caffè Nero, Greggs. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: Roomers Kitchen Remodelers. The Prezzo and New Look branches are not on the current CVA closure list. Notable published retailer requirements: Superdrug. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £42.50 psf ITZA. Range: £35-£42.50 psf ITZA. Comments: The letting of 90 High Street to CEX equates to £37.50 psf ITZA. Retail rents in recent years have been stable. Agents are seeing a rise in shorter leases on retail properties; landlords are reportedly considering 5-year leases with 3rd year breaks on retail lettings. Rates tend not to exceed £40 psf ITZA, which is expected for a town like Street. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: High pedestrian flows on High Street. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 19, 29, 75, 77, 376, 652, 667, 668, 669, 751, X75, National Express. Rail: The nearest train station is Castle Cary, approximately 9.8 miles to the east. Services run to London Paddington, Taunton, Bristol Temple Meads and Weymouth. Car parking: There are two main car parks in the town centre (Wilfrid and Northside). Walking/cycling: near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 74 crimes were reported in the Street policing neighbourhood in May 2018. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Health Check Summary | While the vacancy rate is in line with the national average, there is a good diversity of uses, and strong representation from national multiples. The visual appearance is generally good. The centre appears to be robust and trading at a stable rate. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Local agents: RMW Knight, Boddy & Edwards.

National average vacancy rate obtained from House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Clarks Village (DOV), Street | |
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| Diversity of Uses | <p>Clarks Village is a DOV. It is adjacent to Street town centre. The DOV has 92 units in total comprising:</p> <ul style="list-style-type: none"> Retail (A1): 78 (84.8%); <ul style="list-style-type: none"> Comparison: 76 (82.6%); Convenience: 0 (0%); Service/other: 2 (2.2%); Financial and Professional Services (A2): 0 (0%); Restaurant and Hot Food Takeaway (A3 and A5): 10 (10.9%); Drinking Establishments (A4): 0 (0%); Offices (B1): 0 (0%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 0 (0%); Non-residential Institutions (D1): 0 (0%); Assembly and Leisure (D2): 0 (0%); and Other (Sui Generis): 2 (2.2%). |
| Proportion of vacant street level property | Vacant units 2 (2.2%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6%. Range: 6%-7%. Comments: Clarks Village was acquired in March 2017 by Land Securities. The acquisition formed part of a wider portfolio worth £332.5m. The Net Initial Yield for the portfolio equates to approximately 6.5%. For the Clarks Village scheme in isolation, the acquisition agents were guiding a slightly lower yield of approximately 6%. This shows the strength of the centre, and we expect it to excel as an investment asset. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Marks & Spencer, Hamleys, Sports Direct, Timberland, Vans, GAP, Ben Sherman, Cadbury, Levi's, Lindt. Notable recent retailer additions (last 12 months): Yankee Candle, Barbour, Original Penguin, Hotels Chocolat, Jack Wills. Notable recent retailer closures: None. The Prezzo branch is not on the current CVA closure list. Notable published retailer requirements: Superdrug in Street. While published requirements within the market do not specify Clarks Village, the scheme is very successful and there is likely to be demand for retail space. |
| Commercial rents | <ul style="list-style-type: none"> The retail operators are trading under turnover leases outside of the Landlord and Tenant Act 1954. Former letting agents and the current landlord are unwilling to reveal these figures, but confirm that these vary from tenant to tenant and from trade to trade. Comments: The number of recent retail additions in Clarks Village suggests a very strong demand from both retailers and food & beverage operators. We expect turnover leases to be robust. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Pedestrian flows in the centre are over 4 million per year. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 19, 29, 75, 77, 376, 652, 667, 668, 669, 751, X75, National Express. Rail links: The nearest train station is Castle Cary, approximately 9.8 miles to the east. Services run to London Paddington, Taunton, Bristol Temple Meads and Weymouth. Car parking: Clarks Village has 1,400 spaces (including disabled) and 7 coach bays. There are two additional car parks in town centre (Wilfrid and Northside). Walking/cycling: Clarks Village is a fully accessible and pedestrianised retail outlet. It is near residential neighbourhoods. |

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| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> • CCTV: In place. • General: 74 crimes were reported in the Street policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: None observed in this area. |
| Health Check Summary | Vacancy levels are low, and the quality of operators trading in the centre is high. Clarks Village is in excellent health, and considered to be a premier retail destination within the surrounding area. It is vital and viable. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

Sources:

Inspection

National agents: KLM, CBRE, Knight Frank.

National average vacancy rate obtained from House of Commons Retail Industry Briefing Paper March 2018

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Tiverton Town Centre | |
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| Diversity of Uses | <p>The town centre has a total of 262 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 138 (52.7%); <ul style="list-style-type: none"> Comparison: 84 (32.1%); Convenience: 10 (3.8%); Service: 44 (16.8%); Professional and Financial Services (A2): 22 (8.4%); Restaurant and Hot Food Takeaway (A3 and A5): 33 (12.6%); Drinking Establishments (A4): 6 (2.3%); Offices (B1): 7 (2.7%); General Industrial (B2): 2 (0.8%); Hotels (C1): 2 (0.8%); Dwelling Houses (C3): 0 (0%); Non-residential Institutions (D1): 14 (5.3%); Assembly and Leisure (D2): 1 (0.4%); and Other (Sui-Generis): 11 (4.2%). <p>The main areas are Fore Street, Gold Street and Bampton Street. The town centre has a mix of national multiples and independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 26 (9.9%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 7.5%. Range: 7%-9.12%. Comments: The WHSmith lease at 52-56 Fore Street is being marketed at a Net Initial Yield of 7.58%. 20-22 Fore Street was sold in 2016 at a Net Initial Yield of 8.14%, and is let to The Works. The TUI unit at 27 Fore Street was sold in July 2016 at a Net Initial Yield of 9.12%. Yields are at expected levels for a town like Tiverton. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Banburys, Boots, Greggs, Costa, Clarks, Superdrug. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: Store Twenty One. Notable published retailer requirements: Farmfoods, Toolstation, Lidl, City Electrical Factors, Snap Fitness, Marston's. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £35 psf ITZA. Range: £15-£35 psf ITZA. Comments: The prime retail parades of Fore Street and Bampton Street have maintained healthy ITZA rates, with minimal voids and five recent lettings. The town is performing as it should regarding Zone A rents. 7 Market Walk (secondary location) was let in June 2018 at £7,500 per annum, equating to £16 psf ITZA. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Fore Street shows the strongest footfall in Tiverton. |
| Accessibility | <ul style="list-style-type: none"> Bus Routes: 55, 55A, 55B, 155, 343, 348, 349, 352, 353, 398, 870. Rail: The nearest train station is Tiverton Parkway, approximately 8.5 miles to the east. Services run to Bristol Temple Meads, Exeter St David's and London Paddington. Car Parking: there are three car parks within the centre, including a multi-storey. Walking/cycling: Near residential neighbourhoods. The prime retail parade of Fore Street is pedestrianised. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 74 crimes were reported in the Tiverton Town Centre policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |

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| Comparison to previous Health Checks | The vacancy rate is higher than that shown by CBRE in their 2016 assessment. The rate remains below the national average. Successful lettings agreed in June 2018 should lower the vacancy rate further. |
| Health Check Summary | The vacancy rate is below the national average, and there is a generous retail offer. Yields are at expected levels, and recent lettings are evidence of continuing interest in the centre. The local authority plans to invest in the public realm over the coming years. The centre is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Stratton Creber Commercial, Arc Retail Consultants, Acuitus, Seddons.

CBRE Report on town health checks August 2016

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Cullompton Town Centre | |
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| Diversity of Uses | <p>The town centre has a total of 116 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 46 (39.7%); <ul style="list-style-type: none"> Comparison: 22 (19.0%); Convenience: 5 (4.3%); Service: 19 (16.4%); Professional and Financial Services (A2): 7 (6.0%); Restaurant and Hot Food Takeaway (A3 and A5): 12 (10.3%); Drinking Establishments (A4): 3 (2.6%); Offices (B1): 1 (0.9%); General Industrial (B2): 0 (0%); Hotels (C1): 1 (0.9%); Dwelling Houses (C3): 25 (21.6%); Non-residential Institutions (D1): 8 (6.9%); Assembly and Leisure (D2): 0 (0%); and Other (Sui-Generis): 5 (4.3%). <p>The main retail area is Fore Street. The town centre has a mix of national multiples and independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 8 (6.9%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6%. Range: 6%-9%. Comments: 2 High Street was recently sold at 8%. Local agents have quoted an expected Net Initial Yield of 7.2%, which is expected for the centre. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Co-operative Food, Costa, McDonald's, Coral. Notable recent retailer additions (last 12 months): Costa. Notable recent retailer closures: None. Notable published retailer requirements: Vets4Pets, Subway. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £12 to £15 psf ITZA. Range: £12-£15 psf ITZA. Comments: 2 High Street was recently let to Costa at £15 psf overall. Local agents state a range of £12-£15psf ITZA. The town is performing as it should in terms of the Zone A rents achieved. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Good along Fore Street. |
| Accessibility | <ul style="list-style-type: none"> Car: located on Junction 28 of the M5 Bus: routes: 1, 1A, 1C, 350, 22, 694. Rail: The nearest train station is Tiverton Parkway, approximately 4.5 miles to the north. Services run to Bristol Temple Meads, Exeter St David's and London Paddington. Car parking: Two car parks (Forge Way and Cullompton Library). Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 54 crimes were reported in the Cullompton North & South policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |
| Health Check Summary | The vacancy rate is below the national average. There is a range of occupiers, and ongoing interest from major operators such as Costa. Rents and yields are at expected levels. The centre is widely accessible and robust. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Thorne & Carter, Seddons, Stratton Creber Commercial.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018).

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

Honiton Town Centre

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| Diversity of Uses | <p>The town centre has a total of 227 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 116 (51.1%); <ul style="list-style-type: none"> Comparison: 75 (33.0%); Convenience: 7 (3.1%); Service: 34 (15.0%); Professional and Financial Services (A2): 25 (11.0%); Restaurant and Hot Food Takeaway (A3 and A5): 24 (10.6%); Drinking Establishments (A4): 5 (2.2%); Offices (B1): 2 (0.9%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 23 (10.1%); Non-residential Institutions (D1): 10 (4.4%); Assembly and Leisure (D2): 1 (0.4%); and Other (Sui-Generis): 7 (3.1%). <p>The main area is the High Street. The centre has a mix of national multiples and independent retailers.</p> |
| Proportion of vacant street level property | Vacant units 14 (6.2%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6%. Range: 6%-7.2%. Comments: Lloyds Bank at 82 High Street was sold through Allsop in October 2016 at a yield of 6.61%. 70a-70d High Street was sold in December 2016 at a yield of 7.12%. Available evidence provides a figure 6.6% for Net Initial Yields on the High Street. This is expected for a centre such as Honiton. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Coffee #1, Boston Tea Party, Co-operative Food, Boots, Iceland, Superdrug, Costa. Notable recent retailer additions (last 12 months): Superdrug. Notable recent retailer closures: Store Twenty One (the unit is now occupied by Superdrug). Notable published retailer requirements: Anytime Fitness, Loungers, Caffe Nero, British Heart Foundation, The Works, Subway, Marston's. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £28.75 psf ITZA. Range: £15 to £28.75 psf ITZA. Comments: Former Budgens at 88-90 High Street was let in April 2018 to SPAR at a rent of £28.75 psf ITZA on a 10-year FRI lease. Zone A rents are at expected levels within the centre. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Good along High Street. |
| Accessibility | <ul style="list-style-type: none"> Bus: 4, 4A, 4B, 9, 20, 56B, 367, 368, 387, 681, 682, 694, National Express. Rail: Honiton train station is to the south of the centre. Services run to Exeter Central and London Waterloo. Car parking: There is a choice of car parks that includes Lace Walk, New Street North, New Street South, King Street and Silver Street. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 69 crimes were reported in the Honiton Town policing neighbourhood in May 2018. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Comparison to previous Health Checks | GVA's assessment of 2017 finds that the vacancy rate has changed little over the period 2009-2016. The current rate of vacancy is similar that shown by GVA's report. |
| Health Check Summary | Yields and Zone A rates are at expected levels. Vacancy rates are historically robust and below the national average. There is a range of retailers. Honiton has traditionally been a major secondary target town for growing national retailers, and this reputation has been maintained in recent years. It is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Stratton Creber Commercial, Williams Gunter Hardwick, Alder King, Allsop, Acuitus.

The Greater Exeter Town Centre and Retail Study, prepared by GVA in September 2017

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018).

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

Crediton Town Centre

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| Diversity of Uses | <p>The town centre has a total of 190 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 64 (33.7%); <ul style="list-style-type: none"> Comparison: 41 (21.6%); Convenience: 6 (3.2%); Service: 17 (8.9%); Professional and Financial Services (A2): 8 (4.2%); Restaurant and Hot Food Takeaway (A3 and A5): 18 (9.4%); Drinking Establishments (A4): 3 (1.6%); Offices (B1): 8 (4.2%); General Industrial (B2): 1 (0.5%); Hotels (C1): 1 (0.5%); Dwelling Houses (C3): 59 (31.1%); Non-residential Institutions (D1): 11 (5.8%); Assembly and Leisure (D2): 0 (0%); and Other (Sui-Generis): 6 (3.2%). <p>The town centre has a mix of national multiple and independent retailers. The main area is the High Street.</p> |
| Proportion of vacant street level property | Vacant units 11 (5.8%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 5.5%. Range: 5%-7%. Comments: Evidence is sparse. Local agents have quoted a yield figure of 5.5%, and a range of 5%-7%. This is within expected investment yields for the centre. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Tesco Express, Co-operative Food, Boots. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: None. Notable published retailer requirements: Savers, Vets4Pets. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £29 psf ITZA. Range: £15-£29 psf ITZA. Comments: 124 High Street was recently let at £8,400 per annum, equating to £15 psf ITZA. Costa took a lease on 28 High Street in 2017 at £10 psf overall. Local agents state a range of £19 psf ITZA to £29 psf ITZA. Zone A rates are expected for a town like Crediton. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Reasonable along the High Street. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 5, 5C, 347, 369, 607, 647, 668, 669, 677, 679. Rail: Crediton train station is approximately 1 mile south of the town centre. Services run to Exeter St David's, Barnstaple and Yeoford. Car parking: Two car parks (High Street and Market Street), with limited on-street parking. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 32 crimes were reported in the Crediton Town policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |
| Comparison to previous Health Checks | There appears to be some additional vacancies since the CBRE report of 2016. The vacancy rate is lower than that shown by GVA in their 2017 assessment, and is well below the national average. |

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| Health Check Summary | Crediton maintains a variety of independent and national retailers. Investment yields and Zone A rents meet expectations. The lack of transactional evidence indicates a healthy market, with traders not often forced to sell. The success of existing major retailers in a town so close to Exeter (a major centre) demonstrates local preference for Crediton as a convenient alternative shopping destination. The centre is healthy and robust. |
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Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Local agents: Helmores, Stratton Creber Commercial.

CBRE Report on town health checks August 2016

The Greater Exeter Town Centre and Retail Study, prepared by GVA in September 2017

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018).

Crime data obtained from Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Chulmleigh Town Centre | |
|---|--|
| Diversity of Uses | <p>The centre has 29 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 10 (34.5%); <ul style="list-style-type: none"> Comparison: 6 (20.7%); Convenience: 3 (10.3%); Service/other: 1 (3.4%); Professional and Financial Services (A2): 2 (6.9%); Restaurant and Hot Food Takeaway (A3 and A5): 2 (6.9%); Drinking Establishments (A4): 2 (6.9%); Offices (B1): 0 (0%); General Industrial (B2): 1 (3.4%); Hotels (C1): 2 (6.9%); Dwelling Houses (C3): 7 (24.1%); Non-residential Institutions (D1): 1 (3.4%); Assembly and Leisure (D2): 0 (0%); and Other (Sui Generis): 0 (0%). <p>The main retail offer is around Fore Street and South Molton Street. There is a range of occupiers, and traders principally service residents and businesses the immediate area.</p> |
| Proportion of vacant street level property | Vacant units 2 (6.9%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 10.5%. Range: 7%-10.5%. Comments: In May 2018 a 215 sq. ft. retail unit on Fore Street was sold for £21,000 (guide price was £25,000). The local agent quoted an anticipated rent of £2,340 per annum in light of the sale price (a yield of 10.43%). Owing to the quantity of stock, and the high level of owner occupiers, transactions have been limited and are usually on a vacant possession basis. No recent investment transactions have been reported, but based on the available evidence the range of yields is as expected for a centre of this size. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Central Stores. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: SPAR (now occupied by Central Stores), Lloyds Bank, Seddons Estate Agents. Notable published retailer requirements: No known requirements. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £25 psf ITZA. Range: £4,200-£6,000 per annum (depending on size). Comments: Central Stores is understood to pay £25 psf ITZA (effective November 2015). A high proportion of units are owner occupied, and transactional market evidence is scarce. One of the most active local agents is Keenor Estate Agents, who market units on a Per Calendar Month basis. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Highest along Fore Street and South Molton Street. |
| Accessibility | <ul style="list-style-type: none"> Bus Routes: 5C, 325, 663, 663S. Rail: The nearest station is Eggesford, approximately 1.8 miles to the south. Services run to Barnstaple and Exeter St David's. Car parking: There is a free car park near to the main retail pitch. On-street parking is also available. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: None observed. General: 21 crimes were reported in the South Molton Rural policing neighbourhood in May 2018. Of these, one is recorded as taking place in Chulmleigh. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Health Check Summary | The retail offer within the centre is principally to meet the requirements of the immediate catchment area. The vacancy rate is below the national average, and yields are at expected levels. The town is performing its role in the shopping hierarchy. It is not at risk from competition. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Geoffrey Clap Associates, Keenor Estate Agent.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Crime Statistics: Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| South Molton Town Centre | |
|---|---|
| Diversity of Uses | <p>The centre has 134 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 58 (43.3%); <ul style="list-style-type: none"> Comparison: 35 (26.1%); Convenience: 5 (3.7%); Service/other: 18 (13.4%); Professional and Financial Services (A2): 9 (6.7%); Restaurant and Hot Food Takeaway (A3 and A5): 9 (6.7%); Drinking Establishments (A4): 2 (1.5%); Offices (B1): 7 (5.2%); General Industrial (B2): 0 (0%); Hotels (C1): 2 (1.5%); Dwelling Houses (C3): 27 (20.1%); Non-residential Institutions (D1): 6 (4.5%); Assembly and Leisure (D2): 1 (0.7%); and Other (Sui Generis): 4 (3.0%). <p>The prime retail pitch is Broad Street. South Street and East Street are considered secondary pitches. A County Market is held every Thursday and Saturday.</p> |
| Proportion of vacant street level property | Vacant units 9 (6.7%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6.5%. Range: 6.5%-11.51%. Comments: Commercial investment transactions have been limited. 7 Queen Street is currently for sale at £195,000 and is estimated to command a rental income of £20,000-£23,000 per annum (reflecting a yield of 10%-11.51%). 38 East Street is under offer at £175,000: income is £11,700 per annum, reflecting a yield of 6.54%. The investment market, on limited evidence, appears to be performing well. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: SPAR, Boots, Lloyds Bank, The Original Factory Shop. Notable recent retailer additions (last 12 months): None. Notable recent retailer closures: Barclays Bank. Notable published retailer requirements: No known requirements. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £20 psf ITZA. Range: £15-£20 psf ITZA. Comments: Transactional evidence is sparse, but the range provided by local agents represents expected Zone A rents for the centre. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Good around the Square. Activity is higher when the County Market takes place on Thursday and Saturday. This increase is reported to have grown over the last two years. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 155, 856. Rail: The nearest station is Kings Nympton, located approximately 6 miles to the southwest. Services run to Exeter St David's and Barnstaple. Car parking: A selection of car parks for short and long-term parking. These include Central, Pannier Market and Sheep Pen Area. On-street parking is also available. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 29 crimes were reported in the South Molton policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |

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| Health Check Summary | National retailers are represented, and there are a good number of independent traders. Commercial rents within the town are stable. Yields are good (albeit, based on limited evidence). The vacancy rate is below the national average. The centre is healthy. |
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Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Geoffrey Clap Associates, John Smale & Co, Stags.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Crime Statistics: Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Ilfracombe Town Centre | |
|---|--|
| Diversity of Uses | <p>The centre has 146 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 82 (56.2%); <ul style="list-style-type: none"> Comparison: 53 (36.3%); Convenience: 15 (10.3%); Service/other: 14 (9.6%); Professional and Financial Services (A2): 10 (6.8%); Restaurant and Hot Food Takeaway (A3 and A5): 21 (14.4%); Drinking Establishments (A4): 4 (2.7%); Offices (B1): 2 (1.4%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 0 (0%); Non-residential Institutions (D1): 7 (4.8%); Assembly and Leisure (D2): 5 (3.4%); and Other (Sui Generis): 3 (2.1%). <p>The main retail location is the High Street.</p> |
| Proportion of vacant street level property | Vacant units 12 (8.2%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6.5%. Range: 6.5%-9.51%. Comments: 135 High Street was sold in January 2015 for £165,000, and is occupied by NatWest. It has a total income of £16,000 per annum, reflecting a Net Initial Yield of 9.51%. Four investment properties are currently being marketed. Based upon their current income the projected yields for these units are 6.64%, 6.68%, 7.17% and 8.5-9%. These yields are expected for a centre like Ilfracombe. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Co-operative Food, Superdrug, Lloyds Bank, Ladbrokes, Scope, Subway, William Hill, Costa. Notable recent retailer additions: Costa. Notable recent retailer closures: Shoe Zone. Notable published retailer requirements: Savers, Marston's, Travelodge. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £30 psf ITZA. Range: £15-£30 psf ITZA. Comments: The High Street is a popular retail destination, and a range of national multiples are in occupation. Zone A rents are performing as expected for the centre. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Good along the High Street. There is an influx of tourists during the peak summer months, and this has improved since Damian Hirst's installation on Ilfracombe Pier in 2012. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 21, 301. Rail: The nearest train station Barnstaple, approximately 9 miles away. Services run to Exeter St David's and Exmouth. Car parking: There is choice of car parks, including Wilder Road, Brookdale, Lidl, and one behind Ilfracombe Service Station. On-street parking is available. Walking/cycling: In proximity to residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. Not all Council operated cameras are operational. General: 78 crimes were reported in the Ilfracombe East and Centre policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |

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| Health Check Summary | Vacancy rates are below the national average and rents have remained stable in recent years. Yields are at expected levels. There is a range of occupiers, and current national requirements for the town indicate positive interest. The centre is stable and healthy. |
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Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Webbers, Wright Commercial, Smale and Co.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry:

Statistics and Policy (March 2018)

Crime Statistics: Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Braunton Town Centre | |
|---|---|
| Diversity of Uses | <p>The centre has 88 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 53 (60.2%); <ul style="list-style-type: none"> Comparison: 33 (37.5%); Convenience: 6 (6.8%); Service/other: 14 (15.9%); Professional and Financial Services (A2): 6 (6.8%); Restaurant and Hot Food Takeaway (A3 and A5): 9 (10.2%); Drinking Establishments (A4): 2 (2.3%); Offices (B1): 4 (4.5%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 3 (3.4%); Non-residential Institutions (D1): 3 (3.4%); Assembly and Leisure (D2): 2 (2.3%); and Other (Sui Generis): 2 (2.3%). <p>The main retail offering is on Exeter Road and Caen Street. Occupiers within the centre are predominantly independent traders rather than national multiples.</p> |
| Proportion of vacant street level property | Vacant units 4 (4.5%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 5.09%. Range: 5-8%. Comments: In July 2015, Heddons Croft Dental Surgery on Exeter Road achieved an at-auction sale price of £384,000. The property's total income is £20,500 per annum: the sale reflects a yield of 5.09%. Recent retail investment transactions have been reported, and most premises are understood to be sold on a vacant possession freehold basis. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Co-operative Food, William Hill, Lloyds Pharmacy, Home Hardware. Notable recent retailer additions: None. Notable recent retailer closures: Lloyds Bank. Notable published retailer requirements: No known requirements. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £45 psf ITZA. Range: £22.50-£45 psf ITZA. Comments: Property agents Phillips, Smith and Dunn relocated to No.7 The Square in January 2018, reflecting £45 psf ITZA. Two units are currently available in the Cross Tree Centre (secondary location), quoting per annum rents of £6,250 and £8,000. This reflects £22.50 psf ITZA and £23.50 psf ITZA respectively. The town is performing better than expected in terms of the Zone A rents it is achieving. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Centred along Exeter Road and The Square. Local occupiers report an improved level of footfall in the summer months. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 21, 21A, 303. Rail: The closest train station is Barnstaple, approximately 4.8 miles to the southeast. Services run to Exeter St David's and Exmouth. Car parking: There are several carparks including Caen Medical Centre, and Braunton Library. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: Not identified. Some occupiers have CCTV installed outside their premises. General: 32 crimes were reported in the Broughton Urban policing neighbourhood in May 2018. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Street art and graffiti evident on some commercial properties. |
| Health Check Summary | The vacancy rate is below the national average. Zone A rents are above expected levels, and several off-market deals have occurred in recent years. The retail offer is varied. The centre is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in June 2018.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Inspection

Agents: Phillips, Smith and Dunn, JD Commercial, Smale and Co, Underwood Warmington.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Crime Statistics: Police.uk

Retail requirements: therequirementslist.com

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Wellington Town Centre | |
|---|---|
| Diversity of Uses | <p>The centre has approximately 164 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 85 (51.8%); <ul style="list-style-type: none"> Comparison: 69 (42.1%); Convenience: 16 (9.8%); Professional and Financial Services (A2): 17 (10.4%); Restaurant and Hot Food Takeaway (A3 and A5): 19 (11.6%); Drinking Establishments (A4): 4 (2.4%); and Other: 17 (10.4%). <p>The main retail offer is along Fore Street and the High Street. The centre is anchored by a Waitrose food store.</p> |
| Proportion of vacant street level property | Vacant units 22 (13.4%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6.2%. Range: 6-8%. Comments: 13 High Street was sold in 2015 for £250,000, at a Net Initial Yield of 7.2%. In 2017, 4/6 Fore Street was sold at a Net Initial Yield of 6%; 25 Fore Street at a Net Initial Yield of 8%. The yields being achieved are as expected for a town like Wellington. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Co-operative Food, Greggs, Boots, Warrens Bakery, Superdrug, Coffee#1, Waitrose. Notable recent retailer additions: None. Notable recent retailer closures: Stead and Simpson. Notable published retailer requirements: The Works, Lidl, Vets4Pets. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £25 psf ITZA. Range: £15-£25.15psf ITZA. Comments: 38 High Street (secondary location) was let in 2017 to Loose Ends for £25 psf ITZA. Multiple local agents state that Zone A rates in prime retail are well established at £25 psf. 24 High Street was let in May 2018 at a rate of £25.15 psf ITZA. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Reasonable footfall along High Street and Fore Street. |
| Accessibility | <ul style="list-style-type: none"> Car: located on Junction 26 of the M5. Bus routes: 20, 22, 22A, 623. Rail: The nearest train station is Taunton, approximately 6.4 miles to the northeast. Services run to Paignton, Cardiff Central, Plymouth and London Paddington. Car parking: Four car parks (South Street, North Street, Waitrose, Asda). Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 181 crimes were reported in the Wellington Town policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |
| Health Check Summary | Whilst vacancy rates are slightly above the national average, the persistence of rentals at £25 psf ITZA, and of yields between 6% and 8%, are indicative of the centre's robust health and of good investor demand. There is a range of traders, a variety of significant national multiples in occupation, and interest from additional retailers. It is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.
Diversity of Uses taken from Taunton Deane Borough Council's Wellington Town Centre Retail Survey 2017.

Sources:

Local Agents: Hatfield White, Greenslade Taylor Hunt, Larkman Edgcumbe.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Crime Statistics: Police.uk

Retail requirements: therequirementslist.com.

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Clevedon Town Centre | |
|---|--|
| Diversity of Uses | <p>The centre has 136 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 62 (45.6%); <ul style="list-style-type: none"> Comparison: 40 (29.4%); Convenience: 6 (4.4%); Service/other: 16 (11.8%); Professional and Financial Services (A2): 11 (8.1%); Restaurant and Hot Food Takeaway (A3 and A5): 20 (14.7%); Drinking Establishments (A4): 2 (1.5%); Offices (B1): 2 (1.5%); General Industrial (B2): 0 (0%); Hotels (C1): 0 (0%); Dwelling Houses (C3): 16 (11.8%); Non-residential Institutions (D1): 1 (0.7%); Assembly and Leisure (D2): 2 (1.5%); and Other (Sui Generis): 5 (3.7%). <p>The main retail offering is along Old Church Road and the Triangle.</p> |
| Proportion of vacant street level property | Vacant units 15 (11.0%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 6.5%. Range: 6.5-10.97%. Comments: In July 2018, 6-8 Old Church Street was sold at auction for £365,000. It is occupied by HSBC (lease active until 2023) and generates an income of £30,244 per annum. The sale achieved a Net Initial Yield of 8%. In March 2017, 16-20 The Triangle was sold at auction for £427,500. The property was fully let to Lloyds Bank (lease expiry March 2017) and generated an annual income of £29,000 pa. For a centre of its size, Clevedon is performing well in terms of the yields achieved. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Greggs, Lidl, Boots, William Hill, New Look, WHSmith, Lloyds Bank. Notable recent retailer additions: Teatro Lounge, B&M Bargains. Notable recent retailer closures: New Look (CVA closure list). Notable published retailer requirements: The Works, Lidl, Subway. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £25 psf ITZA. Range: £20-£25 psf ITZA. Comments: In June 2017, WHSmith renewed their lease on 19 The Triangle for a 5-year term at £20,000 per annum (equating to £24 psf ITZA). 26 Old Church Road was let in April 2017 to Willow Chiropractic for a 25-year term with tenant break options every five years. The initial rent was £13,200 per annum (equating to £20.88 psf ITZA). Zone A rates are in the expected margin. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Good flows between the B&M car park and the Triangle/Station Road. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 88, 128, X5, X6, X7. Rail: The nearest railway station is Yatton Station, located approximately 5.8 miles to the south. Services run to Bristol Parkway, Weston-super-Mare, Cardiff Central and Taunton. Car parking: There are car parks at both the Lidl and the B&M Store. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 79 crimes were reported in the Clevedon policing neighbourhood in May 2018. |

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| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Health Check Summary | The vacancy rate is below the national average, rents have remained robust over the past five years, and yields are good. There is range of occupiers that includes major retailers, and there is a healthy interest from national multiples. A steady flow of open market lettings provides further evidence of strong demand. It is generally in a good state of repair. It is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

The health check survey was undertaken in May 2017.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Local agents: Mark Templer.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Crime Statistics: Police.uk.

Retail requirements: therequirementslist.com.

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Okehampton Town Centre | |
|---|---|
| Diversity of Uses | <p>The centre has the following diversity of retail uses:</p> <ul style="list-style-type: none"> • Comparison Goods: 48%; • Convenience Goods: 8.7%; • Service Retailers: 21.3%; • Food and Drink: 12.6%; and • Miscellaneous: 1.6%. <p>The main retail offering is along Fore Street.</p> |
| Proportion of vacant street level property | Vacant units 7.9%, compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> • Prime: 7.5%. • Range: 7.5%-10.5%. • Comments: 30 Fore Street was sold at auction in July 2017 for £350,000. The investment comprised 5 residential flats, and a ground floor retail unit which was let on a 7 year term to an estate agent for £13,000 per annum. 3 Church Court, St James Street was sold at auction in February 2018 for £49,000, which reflects a Net Initial Yield of 10.2%. The yields being achieved are as expected for a centre of this size. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> • Significant retailer representation: Subway, Lidl, Waitrose, Boots, Co-op • Notable recent retailer additions: None. • Notable recent retailer closures: None. • Notable published retailer requirements: The Works, Superdrug, Savers, Vets4Pets. |
| Commercial rents | <ul style="list-style-type: none"> • Prime: £31 psf ITZA. • Range: £20-£31.10 psf ITZA. • Comments: 22 Fore Street was let November 2017 for £12,000 per annum (equating to £22.35 psf ITZA). 103 Northfield Road was let January 2017 for £6,500 per annum, which equates to approximately £31.10 psf ITZA. 13 East Street was let to an accountancy firm December 2017 at £6,000 per annum overall. Rents are within the expected levels for the centre. |
| Pedestrian flows | <ul style="list-style-type: none"> • Predominant flows/activity: Good on Fore Street and along Market Street towards the Co-op and Waitrose. |
| Accessibility | <ul style="list-style-type: none"> • Bus routes: 5A, 6, 6A, 75A, 75B, 118, 178, 630, 631, 633, 648, 670, 671. • Rail: The nearest railway station is Okehampton Station, located to the south of the centre. Services run to Exeter. • Car parking: There are car parks at the Co-op, Waitrose, and the Lidl store. On-street parking is available. • Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> • CCTV: None observed. • General: 53 crimes were reported in the Okehampton Town policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Health Check Summary | The vacancy rate is below the national average. Rents and yields are performing at expected levels. There is a range of occupiers. It is generally in a good state of repair. It is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Percentages may not total 100% due to rounding.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Local agents: Drew Pearce, JD Commercial.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

PBA Retail and Leisure Study on behalf of South Hams and West Devon 2017.

Crime Statistics: Police.uk.

Retail requirements: therequirementslist.com.

Definitions:

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| Minehead Town Centre | |
|---|--|
| Diversity of Uses | <p>The centre has a total of 208 units comprising:</p> <ul style="list-style-type: none"> • Comparison Retail: 90 (43.3%); • Convenience Retail: 16 (9.2%); • Service Retail: 57 (27.4%); • Use Classes A3, A4, A5, C1, C3: 12 (5.8%); • Use Class B: 8 (3.8%); • Use Class D: 6 (2.9%); and • Other & Miscellaneous: 9 (4.3%). <p>The main retail offering is along Park Street, The Parade, and The Avenue.</p> |
| Proportion of vacant street level property | Vacancy rates have historically been low. 10 units were reported vacant in 2011 (equating to 4.8% of total stock). |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> • Prime: 6.3%. • Range: 6.3%-8.5%. • Comments: The HSBC on Wellington Square was sold July 2018 for around £580,000, equating an approximate yield of 7-8%. 21 The Parade was recently sold with an Net Initial Yield of 8.6%. In March 2018, 19 The Parade was sold for £520,000, representing a Net Initial Yield of 6.3%. 18 The Parade was sold with vacant possession in May 2018 at a Net Initial Yield which equates to 8%. Yields are at anticipated levels. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> • Significant retailer representation: Lidl, Morrisons, Costa, Iceland, Co-op, Poundland, Boot, Superdrug. • Notable recent retailer additions: None. • Notable recent retailer closures: None. • Notable published retailer requirements: Warrens, Subway, Vets4Pets, Marston's, Travelodge. |
| Commercial rents | <ul style="list-style-type: none"> • Prime: £35 psf ITZA. • Range: £25-£35 psf ITZA. • Comments: In March 2018, 19 The Parade was let to TSB for £40,000 per annum, equating to £35 psf ITZA. HSBC renewed their lease on Wellington Square in May 2018 at a rate of £42,000 per annum, which equates to £34.85 psf ITZA. Rents are as expected. |
| Pedestrian flows | <ul style="list-style-type: none"> • Predominant flows/activity: Strongest along The Avenue and The Parade. |
| Accessibility | <ul style="list-style-type: none"> • Bus routes: 10, 11, 28, 198, 300, 678. • Rail: The nearest railway station is Taunton Station, located approximately 20.8 miles to the southeast. Services run to Paignton, Cardiff Central, Plymouth and London Paddington. • Car parking: There are car parks at the Co-op store and the Minehead & District Social Club. On-street parking is available. • Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> • CCTV: In place. • General: 79 crimes were reported in the Minehead policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> • Street furniture: Generally good throughout the centre. • Shopfronts: Generally good throughout the centre. • Graffiti: Limited in this area. |
| Health Check Summary | Vacancy rates have been low historically, and the centre is achieving rental rates/yields that are within the expected margins for it's a town of size. The town provides a generally good appearance, with a solid service offering, and appears to be trading at a healthy rate. It is not at risk. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.
Total number of units includes vacant units.
Percentages may not total 100% due to rounding.
All yields referred to are net initial yields i.e. net of purchaser's costs.
The town centre boundary for current assessment may differ from previously reported studies.
Historic vacancy rates sourced from West Somerset Council Town and Village Centres Study 2011.
Diversity of Uses sourced from Statement of Common Ground on Retail Matters between J Gliddon & Sons Ltd and West Somerset Council 2017.

Sources:

Local agents: Greenslade Taylor Hunt, Hartnell Taylor
National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)
Crime Statistics: Police.uk.
Retail requirements: therequirementslist.com.

Definitions:

ITZA (In Terms of Zone A): A form of measurement used in the retail property market. It is a method of calculating the floor area of a retail unit in relation to the width of the frontage and therefore the amount of visibility versus its depth. The industry uses ITZA as a means of comparing one retail unit to another when analysing open market lettings or rent review evidence.

| Chard Town Centre | |
|---|---|
| Diversity of Uses | <p>The centre has 126 units comprising:</p> <ul style="list-style-type: none"> Retail (A1): 73 (60.8%); <ul style="list-style-type: none"> Comparison: 36 (30%); Convenience: 13 (10.8%); Service/other: 24 (20%); Professional and Financial Services (A2): 19 (15.8%); Restaurant and Hot Food Takeaway (A3 and A5): 13 (10.8%); and Drinking Establishments (A4): 2 (1.7%). <p>The main retail offering is along Fore Street. The centre is anchored by a Sainsbury's and a Lidl food store.</p> |
| Proportion of vacant street level property | Vacant units 13 (10.8%), compared to the national average of 11.1%. |
| Commercial yields on non-domestic property | <ul style="list-style-type: none"> Prime: 7.8%. Range: 7.8%-11.92%. Comments: In Q4 2017, the freehold interest of 2-6 Fore Street sold for £512,500. The sale reflected a yield of 8.38%, with an annual income of £44,250. In July 2017 the freehold interest of 5 Holyrood Street was sold for £240,000. At the time of sale the annual income was £28,600 per annum, reflecting a Net Initial Yield of 11.92%. 30 Holyrood Street – occupied by Sainsbury's – was sold at auction for £2.29m in May 2017 (reflecting a Net Initial Yield of 7.8%). Yields are performing as expected for a centre of this size. |
| Retailer representation and intentions to change representation | <ul style="list-style-type: none"> Significant retailer representation: Lloyds Bank, Boots, Coral, William Hill, Holland and Barrett, British Heart Foundation, Superdrug, Sainsbury's, Lidl, Tesco. Notable recent retailer additions: Costa, Superdrug. Notable recent retailer closures: None. Notable published retailer requirements: The Works, Warrens Bakery and Subway. Lidl have a requirement for a bigger site. |
| Commercial rents | <ul style="list-style-type: none"> Prime: £22 psf ITZA. Range: £22-£30.50 psf ITZA. Comments: Superdrug took a 5 year term in May 2017 at 2-6 Fore Street at an initial rent of £44,250 per annum (equating to £22.07 psf ITZA). In February 2016, Costa took a 10 year lease at 24 Fore Street at an initial rent of £20,000 per annum, which equates to £30.50 psf ITZA. The British Heart Foundation holds a 15 year lease (starting October 2007). It is subject to 5 yearly upward only rent reviews. The October 2012 and 2017 reviews remain outstanding; as such the rent remains at £20,000 per annum, equating to £27.25 psf ITZA. Rents along the main retail pitch are well established around the £22-30.50 range, and are within anticipated rates for the centre. |
| Pedestrian flows | <ul style="list-style-type: none"> Predominant flows/activity: Strongest along Fore Street. |
| Accessibility | <ul style="list-style-type: none"> Bus routes: 14, 30, 96, 96A, 96C, 99. Rail: The nearest railway station is Axminster Station, located approximately 6.3 miles to the south. Services run to London Waterloo, Taunton and Exeter St Davids. Car parking: There are car parks at Sainsbury's, Lidl, the Methodist Church, and Chard Library. Walking/cycling: Near residential neighbourhoods. |
| Perception of safety and occurrence of crime | <ul style="list-style-type: none"> CCTV: In place. General: 114 crimes were reported in the Chard policing neighbourhood in May 2018. |
| State of town centre environmental quality | <ul style="list-style-type: none"> Street furniture: Generally good throughout the centre. Shopfronts: Generally good throughout the centre. Graffiti: Limited in this area. |

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| Comparison to previous Health Checks | Lichfields' study of 2017 reports that the vacancy rate in 2010 was 15%. It is lower today. |
| Health Check Summary | The vacancy rate is below the national average. There is a good range of occupiers, including stores for major retailers. It is generally in a good state of repair. Rents and yields are at expected levels. The centre is healthy. |

Notes:

The percentage of 'Diversity of Uses' indicator includes the 'Proportion of vacant street level property'.

Total number of units includes vacant units.

Percentages may not total 100% due to rounding.

All yields referred to are net initial yields i.e. net of purchaser's costs.

The town centre boundary for current assessment may differ from previously reported studies.

Sources:

Local agents: RMW Knight, Symonds and Sampson, Greenslade Taylor Hunt.

National average vacancy rate obtained from House of Commons Briefing Paper – The Retail Industry: Statistics and Policy (March 2018)

Lichfields' South Somerset Retail and Main Town Centre Uses Report 2017.

Crime Statistics: Police.uk.

Retail requirements: therequirementslist.com.

Definitions:

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APPENDIX C: ALLOCATIONS AND SEQUENTIAL SITES

TABLE 1: TOWN CENTRE (WITHIN PSA)

| SITE | LPA | POLICY STATUS | AVAILABILITY | SUITABILITY |
|---------------------------------|----------------------------|---|---|---|
| Phoenix Lane, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/19 | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is less than a hectare, which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for approximately 2,400 sqm of retail, office and/or leisure floorspace, and accessible public space. |
| Bampton Street, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/20 | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the Ju27 proposals. | Unsuitable: The site is less than a hectare, which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for the development of small retail units to accommodate 900 sqm of floorspace. |
| Bus and Coach Station | Exeter City Council | Local Plan 2004 (Adopted March 2005, Saved Policies): Policy KP3 | Unavailable: Permission granted July 2016 for retail and leisure-led mixed-use development comprising Use Classes A1, A2, A3, A4, A5 [retail including food and drink uses], D1 and D2 [assembly and leisure], a new Leisure Centre and a new bus station. Reference: 15/0791/OUT. Applicant was the Crown Estate. Condition 7 restricts the GIA for A1 uses to no more than 11,000 sqm. It is understood that in 2017 the Crown Estate withdrew its plans to develop the site. However, Exeter City Council is progressing with the enabling works for the construction of the leisure centre and bus station. Plans for the remainder of the site are subject to viability and commercial testing. | Unsuitable: The site is circa 3.3 ha., which is too small for the J27 development (DOV or as a whole). The site has outline consent which restricts the scale of A1 uses to no more than 11,000 sqm, which is smaller than the DOV floorspace. The proximity to Exeter City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Waterfront | East Devon | East Devon Local | Unavailable: Alternative seafront | Unsuitable: Development would need to be fragmented on |

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| Redevelopment Sites, Exmouth | District Council | Plan | proposals in the pipeline. | several sites. The proximity to Exeter would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. Location too inaccessible from M5 for viable DOV. |
| Estuaryside, Exmouth | East Devon District Council | Exmouth Masterplan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed-use development to include the relocation of the bus depot, and a private railway station car park, and a new food store to act as an anchor store to the western part of the town centre. The proximity to Exeter would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. Location too inaccessible from M5 for viable DOV. |
| The New London Inn Quarter, Exmouth | East Devon District Council | Exmouth Masterplan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: This site is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for redevelopment which includes a multi-storey car park, comparison retail, residential, office and potential for a hotel. The proximity to Exeter City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. Location too inaccessible from M5 for viable DOV. |
| East and West of High Street, Taunton | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy Hs1 | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is approximately 3.7 ha., which is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include a minimum of 20,000 sqm gross of additional comparison and convenience retail space east of High Street; a minimum of 12,500 sqm gross additional comparison and convenience retail west of High Street; leisure and cultural space to the west of High Street; approximately 120 dwellings east of the High Street; and approximately 90 dwellings west of High Street. The proximity to Taunton Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| East of the Water Wharf | Torridge District Council | North Devon and Torridge Local Plan 2011-2031 (Submission Draft incorporating | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the J27 | Unsuitable: The site is less than a hectare, which is too small for the J27 development (DOV or as a whole) |

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| | | Main and Minor Modifications, July 2017): Draft Policy BID07 | proposals. | |
| Bridge Street Car Parks, Bideford | Torridge District Council | North Devon and Torridge Local Plan 2011-2031 (Submission Draft incorporating Main and Minor Modifications, July 2017): Draft Policy BID07 | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is less than a hectare, which is too small for the J27 development (DOV or as a whole). Too close to Atlantic Outlet Village for viable DOV scheme. |
| Queen Street/ Bear Street, Barnstaple | North Devon Council | North Devon Local Plan: Policy BAR6a North Devon and Torridge Local Plan 2011-2031 (Submission Draft incorporating Main and Minor Modifications, July 2017): Draft Policy BAR11 | Availability uncertain: No visibility of Marketing. The site is owned by North Devon Council, and a revised masterplanning exercise focussed on residential development is underway. | Unsuitable: The site is approximately 2.8 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site has been subject to masterplanning work, the results of which have been declared undeliverable due to remediation costs and the need to retain car parking. A revised masterplan is in preparation with a focus on residential uses. The proximity to Barnstaple Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. Too close to Atlantic Outlet Village for viable DOV scheme. |
| South Street and Broad Street, South Molton | North Devon Council | North Devon Local Plan: Policy SMO6 North Devon and Torridge Local Plan 2011-2031 | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is approximately 3.5 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a food store; a mix of retail, leisure, residential and community uses; and the provision of a bus interchange facility. |

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| | | (Submission Draft incorporating Main and Minor Modifications, July 2017): Draft Policy SM04 | | |
| Town Centre Markets Area, Newton Abbot | Teignbridge District Council | Teignbridge Local Plan 2013 - 2033 (Adopted May 2014): Policy NA9 | Availability uncertain: No visibility of Marketing. No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is part of the primary shopping area for Newton Abbot and is allocated to deliver 11,000 sqm net comparison gross retail floorspace, and additional leisure and commercial space including a cinema (D2) and food and drink outlets (A3-A5). |
| Colin Campbell Court | Plymouth City Council | City Centre and University Area Action Plan (Adopted April 2010): Proposal CC08 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development as whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for redevelopment to deliver a mix of uses including convenience (food based) retail, small scale comparison retail, leisure, cultural and community uses, and residential development. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Cornwall Street | Plymouth City Council | City Centre and University AAP (Adopted April 2010): Proposal CC11 Plymouth and South West Devon Joint Local Plan (Submission Draft): Draft Policy PLY10 | Unavailable: The site benefits from numerous planning permissions for mixed use developments comprising A1, A2, A3, A4, B1 and D2 uses. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a new department store and the redevelopment of Cornwall Street (east) and the remainder of the Cornwall Street (west) block to create approximately 61,000 sqm gross retail floorspace. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |

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| New George Street West, City Centre | Plymouth City Council | Plymouth and South West Devon Joint Local Plan (Submission Draft): Draft Policy PLY12 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for retail-led mixed-use development through sensitive refurbishment and extension of the existing buildings. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Royal Assurance site, Armada Way, City Centre | Plymouth City Council | Plymouth and South West Devon Joint Local Plan (Submission Draft): Draft Policy PLY13 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for retail-led mixed-use development through sensitive refurbishment and extension of the existing buildings. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Commercial Wharf, Phoenix Wharf, Elphinstone and Lambhay Hill | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH01 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for waterfront redevelopment to include leisure and tourism uses marine-related employment (1,200 sqm), specialist retail uses related to tourism/cultural function (3,300 sqm), cafes and restaurants, and residential development (90 dwellings). The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Bretonside Bus and Coach Station and environs | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH02 | Unavailable: Permission granted May 2015 for redevelopment of the Bretonside Bus Station to include a cinema (Class D2), food and beverage uses (Class A3, A4, A5), car parking, landscaping, public realm improvements, external seating and associated highway works. Reference: 15/00159/FUL. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for redevelopment to include employment (B1) (2,200 sqm); residential (310 dwellings); small scale retail, cafes, bars and restaurants (5,400 sqm); leisure and tourism uses. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| North Quay House Car Park | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH03 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include offices above ground floor level; and small-scale retail units, cafes and restaurants at |

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| | | | | ground floor level (circa 750 sqm retail floorspace). The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Exeter Street | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH04 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for redevelopment to include 26,200 sqm office space; residential (240 dwellings); retail units, cafes and restaurants (3,300 sqm). The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Friary Park | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH05 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for redevelopment to include residential (530 dwellings), offices (21,100 sqm), commercial uses (5,250 sqm). The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Sites east and west of Sutton Road | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH07 | Unavailable: Numerous applications have been submitted for mixed use development. There is no evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a new neighbourhood to include residential (720 dwellings); 25,700sqm employment floorspace (Class B1); cafes, restaurants and shops (7,800 sqm); leisure and tourism related uses. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Coxside/Barbican Car Park | Plymouth City Council | Sutton Harbour Area Action Plan (Adopted 2008): Proposal SH08 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). It does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include leisure/tourism uses; small-scale retail units, cafes and restaurants (1,000 sqm); Employment uses (3,800 sqm); residential (85-120 dwellings). The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Fish Market | Plymouth City Council | Sutton Harbour Area Action Plan | Availability uncertain: No evidence to suggest this site is | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the |

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| | | (Adopted 2008): Proposal SH09 | available for development within a similar timeframe to the J27 proposals. | Council's aspirations for the site. The site is allocated for retail/restaurant/visitor centre uses (approximately 400 sqm). The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Saxonvale and Westway Centre, Frome | Mendip District Council | Local Plan 2006 - 2029: Part I: Strategy and Policies (Adopted December 2014): Policy CP6C Local Plan 2006-2029: Part II: Sites and Policies (Pre-Submission Draft, (January 2018): Draft Policy FR1: Saxonvale | Unavailable: Permission granted September 2016 on appeal for residential development on part of the site. Reference: 2014/1224/OTS. The existing Lidl food store remains operational. | Unsuitable: The site (5.49ha.) is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a comprehensive mixed-use development that will deliver a medium-scale food store, up to 7,000 sqm of additional non-food retail, residential uses, and at least 5,750 sqm of flexible office/studio space. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Land at Princes Road/Priory Road, Wells | Mendip District Council | Local Plan 2006 - 2029: Part I: Strategy and Policies (Adopted December 2014): Policy CPC10C | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a town centre extension to include up to 7,500 sqm of non-food retail floorspace. This is smaller than the J27 development and DOV. The proximity to Clarks Village at Street would undermine the viability of the DOV. |
| Land between Boden Street and Silver Street, Chard | South Somerset District Council | Local Plan 2006-2028 (Adopted March 2015): MU/CHAR/4 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is approximately 1.4 ha. and, is too small for the J27 development (DOV or as a whole). The DOV does not fit with the Council's aspirations for the site. The site is allocated for mixed use including residential, retail and business uses. |
| Land at Newland Car Park North and Newland Car Park South, Sherborne | West Dorset Council | West Dorset, Weymouth & Portland Local Plan (Adopted 2015): | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is less than a hectare, which is too small for the J27 development (DOV or as a whole). |

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| | | Policy SHER2 | | |
| Dolphin Square, St James Street and Victoria Square Areas, Weston-super-Mare | North Somerset Council | North Somerset Council Core Strategy (Adopted January 2017): Policy CS29 | <p>Unavailable: Permission granted April 2011 on part of the site for the erection of a hotel (C1 hotel use) with restaurant (A3 restaurant and cafe use) and public house (A4 drinking establishment use), and erection of a multi-storey car park with 381 spaces. The application included outline consent for a new multi-use retail and leisure complex comprising a multiplex cinema; a health and fitness suite and bowling centre (D2 assembly and leisure), restaurants (A3 Restaurant and cafe use) and retail units (A1 retail use). (circa 4,150 sqm A1 floorspace). Reference: 10/P/2264/F.</p> <p>Construction is substantially complete and several units are operational. North Somerset Council is working with Homes England to bring forward the development of approximately 180 dwellings on the remaining part of the site.</p> | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated as part of the regeneration of Weston-super-Mare's town centre. North Somerset Council is working with Homes England to bring forward the development of about 180 new high-quality dwellings on the remaining part of the site. |

TABLE 2: EDGE OF CENTRE (WITHIN 300M OF PSA)

| SITE | LPA | POLICY STATUS | AVAILABILITY | SUITABILITY |
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| Site at Belmont Hospital, Belmont Road, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/11 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is 1.4 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 76 dwellings. |
| Site at St Andrew Street, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/12 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is 0.5 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 55 dwellings. |
| Site at William Street, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/13 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is 0.9 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 45 dwellings. |
| Blundells Garage, Station Road, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/15 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is 0.3 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 13 dwellings. |
| The Woods Group, Exeter Road, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is 0.17 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 8 dwellings. |
| Anchorwood Bank, Barnstaple | North Devon Council | North Devon Local Plan (Adopted July 2006): Policy BAR1a | Unavailable: Outline permission granted January 2014 for: 6,820 sqm (retail food store, retail sales 3,662 sqm net) (Asda); Up to 7,154 sqm (convenience retail/service A1 & A2); Up to 1,116 sqm (restaurants/café A3); petrol filling station. Reference: 55809. Construction is substantially complete. | Unsuitable: The site is circa 9 ha., which is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a mixed-use development to include approximately 400 dwellings; light industrial and office use, and 6,000-10,000 sqm of non-food bulky goods retailing. The proximity to Barnstaple Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. Too close to Atlantic Outlet Village for viable DOV scheme. |
| The Cattle Market, | North Devon | North Devon Local Plan | Availability uncertain: No visibility of marketing. Cattle | Unsuitable: The site is less than a hectare, which is too small for the J27 development (DOV or as a whole). |

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| Barnstaple | Council | (Adopted July 2006): Policy BAR6b | Market Car Park remains operational. No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | |
| Land to The Rear of Lower Boutport Street and Silver Street, Barnstaple | North Devon Council | North Devon Local Plan (Adopted July 2006): Policy BAR6c | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is less than a hectare which is too small for the J27 development (DOV or as a whole). |
| Former Fire Station Site, Holsworthy | Torridge District Council | Torridge Local Plan: Policy HOL6 | Unavailable: Permission granted April 2004 for a retail food store (circa 1,880 sqm). Reference 1/1727/2003/FUL. Constructed and occupied by Waitrose. | Unsuitable: The site is less than a hectare which is too small for the J27 development (DOV or as a whole). |
| Land south of Under Lane, Holsworthy | Torridge District Council | North Devon and Torridge Local Plan 2011-2031 (Submission Draft incorporating Main and Minor Modifications, July 2017): Draft Policy HOL02 | Unavailable: Permission granted November 2017 for addition of eight units at the Former Holsworthy Livestock Market site. Ref: 1/1103/2016/FULM). Site was previously granted consent for residential development of 91 dwellings. Permission granted January 2014 for food store (gross external area 2,213 sqm; gross sales area 1,394 sqm). Ref: 1/0082/2012/FULM. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include: 90 dwellings and a new convenience retail food store. |
| Riverside (Firepool) | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy Fp1 | Unavailable: Resolution to approve an outline application in March 2018 for 200 dwellings; hotel (4,000 sqm); convenience store (3,500 sqm) comparison retail (6,000 sqm); cinema; food and drink outlets (2,600sqm); office space; and car parking. Reference: 38/17/0150. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include at least 47,000 sqm net office space, approximately 8,000 sqm gross of additional retail and leisure floorspace (of which 4,000 sqm gross should be convenience retailing), approximately 400 dwellings, a 500-space multi-storey car park, a 3- or 4-star hotel with at least 100 bedrooms, primary healthcare facilities, and the relocation of the Produce Market within the town centre. The proximity to Taunton Town Centre would render the DOV unviable |

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| | | | | because occupiers would not want their discount brand to compete with their existing high street stores. |
| Coal Orchard Car Park | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy CR2 | Unavailable: Outline permission granted April 2018 for mixed use development comprising of retail, commercial, restaurant, residential, car parking and associated public realm. Reference: 38/16/0357. An application for full planning permission was submitted on the same site in May 2018 for retail/office/commercial - (840 sqm); restaurant (1,070 sqm); residential (42 dwellings); car parking. Reference: 38/18/0185. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for circa 3,000 sqm of comparison and convenience retail floorspace, leisure, restaurants/bars and 50 dwellings. |
| Morrisons | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy Cr5 | Availability uncertain: No visibility of marketing. The Morrisons food store remains operational. | Unsuitable: The site is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for longer term redevelopment to accommodate around 8,000 sqm gross of large-format retailing and 'like-for-like' replacement food store (circa 5,000 sqm). The proximity to Taunton Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Wood Street Sites | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy Tg1 | Unavailable: Part of the allocation (Tg1/1) is subject to a pending application to form 72 no. apartments for the elderly. Reference: 38/18/0079. | Unsuitable: The site is too small to accommodate the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for public uses (a swimming pool and/or library), approximately 500 sqm gross retailing and leisure uses, approximately 80 dwellings. The proximity to Taunton Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |

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| Tangier | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy Tg2 | Unavailable: Tg2/1 is subject to a pending application for residential development of 182no. dwellings comprising 18 houses and 164 apartments. Reference: 38/18/0162. Applicant is Galliford Try. Tg2/6 is occupied by a Lidl food store. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a minimum of 3,000 sqm gross additional comparison and convenience retail floorspace and approximately 525 dwellings. The proximity to Taunton town centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |
| Tesco | Taunton Deane Borough Council | Taunton Town Centre Area Action Plan (Adopted October 2008): Policy Tg3 | Availability uncertain: No visibility of marketing. Site Tg3 is occupied by Tesco and remains operational. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a new food store of about 7,000 sqm gross. |
| Brunswick Street/Northumberland Place | Teignbridge District Council | Teignbridge Local Plan 2013 - 2033 (Adopted May 2014): Policy TE4(a) | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is 0.32 ha., which is too small to accommodate the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for up to 40 new dwellings and 1,000 sqm comparison floorspace. |
| Former Ministry of Defence South Yard Enclave | Plymouth City Council | Devonport Area Action Plan (Adopted August 2007): Proposal DP01 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for redevelopment to include a new local shopping centre, (including a medium sized supermarket, approximately 930 sqm net), approximately 930 sqm of comparison retail space, 460 dwellings, 2,500 sqm B1 employment use, 1,000 sqm B2 employment use. |
| Land between Western Approach/ Union Street and East Quay/ Clyde Quay | Plymouth City Council | Millbay and Stonehouse Area Action Plan (Adopted August 2007): Proposal MS03 | Unavailable: Permission renewed subject to S106 in October 2012 for a mixed-used development comprising residential development (Use Class C3) of up to 1,232 dwellings; up to 39 live/work units, maximum of 4,095 sqm; employment use (B1) up to 40,206 sqm; retail (A1) up to 9,026 sqm; food and drink (Use Classes A3 & A4) up to 13,824 sqm; hotel use (C1) up to 9,209 sqm. Reference: | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated as a new neighbourhood to include 1,300 dwellings, cafes, restaurants, shops, offices (35,000-45,000 sqm), tourism/leisure-related shopping; community facilities, hotel. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. |

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| | | | 10/01882/OUT | |
| Northgate | Sedgemoor District Council | Core Strategy (Adopted September 2011): Policy P2 | <p>Unavailable: Outline permission) granted July 2016 for a food store (up to 1,858 sqm) or (as an alternative to the food store) 70 bed hotel and public house (A4); cinema/leisure complex building including up to 6 cinema screens, 6 A3/A4 or A5 food and drink uses and Health and Fitness use (up to 4,645 sqm GIA). Reference: 08/16/00063.</p> <p>Aldi is intending to relocate to part of the site. The remainder of the site is owned by Sedgemoor District Council, who announced (as of 23 May 2018) that it will prepare an application for a cinema, restaurants and gym.</p> | Unsuitable: The site is 2.3 ha., which is too small for the J27 development (DOV or as a whole). |
| Birnbeck Pier | North Somerset Council | Sites and Policies DPD (Adopted April 2018) | Availability uncertain: No visibility of marketing. The allocation covers several existing buildings that remain operational. The pier is currently in a state of disrepair. | Unsuitable: The site is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a mixed-use scheme comprising residential (50 dwellings), leisure, hotel and tourism, ancillary retail, cafés, bars and restaurants, and community facilities. The proximity to Bristol City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would not adequately serve the core catchment. |
| Old Mill Road, Portishead | North Somerset Council | Sites and Policies DPD (Adopted April 2018) | Unavailable: The landowner (Standard Life Investment) has undertaken public consultation (closed November 2017) on proposed plans to deliver a 25,000 sqft cinema with up to six screens; approximately 69,000 sqft of ground floor retail space; up to 22,000 sqft of other ground | Unsuitable: The site is circa 5.7 ha., which is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a mix of employment uses, retail, leisure, cafés, bars, restaurants and residential. The policy does not support a net loss in employment capacity and existing businesses should be relocated or incorporated into the scheme. The proximity to Bristol City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with |

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| | | | floor commercial/community space; up to 350 new dwellings; around 17,000 sqft of restaurant/café/bar space; approximately 10,000 sqft of leisure/gym space. | their existing high street stores. The peripheral location would not adequately serve the core catchment. |
| Station Area and Swannery Car Park, Weymouth | West Dorset Council | West Dorset, Weymouth & Portland Local Plan (Adopted 2015): Policy WEY3 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated as a transport hub, including a mix of 'small scale' retail, commercial businesses and residential. The proximity to Weymouth and Dorchester Town Centres would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would not adequately serve the core catchment. |
| Westwey Road and North Quay Area | West Dorset Council | West Dorset, Weymouth & Portland Local Plan (Adopted 2015): Policy WEY7 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use redevelopment which may include residential, hotel, commercial and small-scale retail development to create an active street and waterfront. The proximity to Weymouth and Dorchester Town Centres would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would not adequately serve the core catchment. |
| Land off Trinity Street, Dorchester | West Dorset Council | West Dorset, Weymouth & Portland Local Plan (Adopted 2015): Policy DOR5 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. | Unsuitable: The proximity to Dorchester Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would not adequately serve the core catchment. |
| Charles Street, Dorchester | West Dorset Council | West Dorset, Weymouth & Portland Local Plan (Adopted 2015): Policy DOR4 | Unavailable: Permission renewed September 2013 for comprehensive redevelopment comprising retail units (Class A1, circa 13,000 sqm GIA), restaurants and cafes (Use Class A3), financial and professional services (Use Class A2), a hotel | Unsuitable: The proximity to Dorchester Town Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would not adequately serve the core catchment. |

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| | | | (Use Class C1), residential apartments (Use Class C3). Reference: 1/ D/13/001272. | |
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TABLE 3: OUT OF CENTRE (MORE THAN 300M OF PSA)

| SITE | LPA | POLICY STATUS | AVAILABILITY | SUITABILITY |
|-----------------------------------|----------------------------|---|--|---|
| North West Cullompton | Mid Devon District Council | Allocations and Infrastructure DPD Mid Devon Local Plan Review 2013 - 2033 (Proposed Submission incorporating Proposed Modifications, January 2017): | Unavailable: Allocated for major development. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for residential-led mixed use development (1,200 dwellings) and commercial floorspace. The commercial floorspace allocation is 21,000 sqm, which will include a care home or retirement complex, and other suitable uses such as a hotel or leisure development. |
| East Cullompton | Mid Devon District Council | Mid Devon Local Plan Review 2013 - 2033 (Proposed Submission incorporating Proposed Modifications, January 2017): Draft Policy CU7 | Unavailable: The site is being promoted by Lightwood Land as a garden village. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site (160 ha.) is allocated for mixed use development to include 1,750 dwellings within the plan period and further development of at least 850 dwellings post-2033; 20,000 sqm commercial floorspace within the plan period, and a further 12,000 sqm post-2033, to include a care home or retirement complex, appropriately scaled retail development and other suitable uses such as offices and a hotel or leisure development. The site is one of the garden villages announced by Government in January 2017. |
| Farleigh Meadows, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/8 | Unavailable: Allocated for major development. Not sequentially preferable to J27. | Unsuitable: The site is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for circa 300 dwellings and 7,000 sqm B1 floorspace. |
| Blundells School, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/9 | Unavailable: Allocated for major development. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for circa 200 dwellings and 7,000sqm B1 floorspace. |
| Howden Court, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: | Unavailable: Allocated for major development. Not sequentially preferable to J27. | Unsuitable: The site is 11.2 ha., which is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for circa 300 dwellings. |

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| | | Policy AL/TIV/10 | | |
| Roundhill, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/16 | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 0.3 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 13 dwellings. |
| Hay Park, Canal Hill, Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/TIV/17 | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 0.3 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 13 dwellings. |
| Eastern Urban Extension of Tiverton | Mid Devon District Council | Allocations and Infrastructure DPD | Unavailable: Allocated for major development. Not sequentially preferable to J27. | Unsuitable: The site is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. |
| Well Parks, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD: Policy AL/CRE/1 | Unavailable: Allocated for major development. Not sequentially preferable to J27. | Unsuitable: The site (18.3 ha.) is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 185 dwellings and 15 ha. of Green Infrastructure. |
| Red Hill Cross, Exhibition Road, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 3.1 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 135 dwellings. |
| Cromwells Meadow, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 1.3 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 50 dwellings. |
| George Hill, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 1.2 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 25 dwellings. |
| Wellparks, A377, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 1.5 ha., which is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for employment development. |
| Exhibition Road, Crediton | Mid Devon District Council | Allocations and Infrastructure DPD | Unavailable: Allocated for development. Not sequentially preferable to J27. | Unsuitable: The site is 5.35 ha., which is too small for the J27 development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated for the relocation of Queen Elizabeth Community College. |
| Pedlerspool, | Mid Devon | Allocations and | Unavailable: Allocated for | Unsuitable: The site is 21 ha., which is too small for the J27 |

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| Exhibition Road, Crediton | District Council | Infrastructure DPD | development. Not sequentially preferable to J27. | development as a whole. The J27 development does not fit with the Council's aspirations for the site. The site is allocated as a contingency site for development for residential and employment floorspace. |
| Development at Cranbrook, Exeter | East Devon District Council | East Devon Local Plan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated as a new market town to deliver 6,000 new dwellings, 15 ha. employment land, a new town centre that will provide the focal point for retail provision, social and community and education facilities, and infrastructure. |
| Development north of Blackhorse/ Redhayes, Exeter | East Devon District Council | East Devon Local Plan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development after 2021, or once 4,000 dwellings have commenced at Cranbrook (whichever comes sooner). The scheme should comprise 600 new dwellings, a neighbourhood centre, social and community facilities, and associated infrastructure. |
| Development of an urban extension at Pinhoe, Exeter | East Devon District Council | East Devon Local Plan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 800 new dwellings, 3 ha. employment land, neighbourhood centre, social and community facilities and infrastructure. |
| Goodmores Farm, Exmouth | East Devon District Council | East Devon Local Plan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 350 dwellings, and approximately 5 ha. of land for mixed use employment, community and commercial facilities. |
| Phase 3 at Liverton Business Park, Exmouth | East Devon District Council | East Devon Local Plan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for employment uses. |
| Littleham Plum Park, Exmouth | East Devon District Council | East Devon Local Plan | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 350 new dwellings. |

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| Site West of Buckleigh Rd, Northam | Torridge District Council | North Devon and Torridge Local Plan 2011-2031 (Submission Draft incorporating Main and Minor Modifications, July 2017): Draft Policy NOR02 | Unavailable: Two outline applications pending for residential development. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for residential-led development (30 ha.) that includes approximately 740 dwellings; and a local centre that includes facilities to accommodate community and retail uses. |
| East the Water, Bideford | Torridge District Council | Torridge Local Plan 1997 - 2011 (Adopted September 2004): Policy BID2 | Unavailable: Permission granted on most of the site for residential-led development, the erection of a foodstore comprising 1,000 sqm net retail area (1580 sqm gross) and a range of 4 lock-up shops, totalling 2,030 sqm gross. Construction is complete. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for residential and shopping facilities, including a retail food store. Too close to Atlantic Outlet Village for viable DOV scheme. |
| Wellington Longforth | Torridge District Council | Core Strategy (Adopted 2012): Policy SS3 | Unavailable: Outline Permission granted on part of the site January 2013 for 503 dwellings, a primary school and associated infrastructure. Reference: 43/11/0104. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include 900 dwellings; a new local centre to include local convenience shopping; and 11 ha. employment land. |
| Wellington Case/Jurston | Taunton Deane Borough Council | Core Strategy (Adopted 2012): Policy SS4 | Unavailable: Phase 1 (approximately 650 dwellings with a primary school and local centre) was approved in December 2015. Construction is underway. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include 900 dwellings and a new local centre to include local convenience shopping. |
| Comeytrow/Trull | Taunton Deane Borough Council | Site Allocations and Development Management Plan (Adopted December 2016): Policy TAU1 | Unavailable: An outline application was submitted by Taylor Wimpey, Mactaggart and Mickel, Bovis Homes and Summerfield Developments in December 2014 for a residential and mixed use urban extension to | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed-use development to include approximately 2,000 dwellings; a convenience store (500 sqm gross); other retailing (500 sqm gross); Class A2, A3, A4, A5 Uses; community uses; 5 ha. employment land; a primary school. |

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| | | | include up to 2000 dwellings, up to 5.25 ha. of employment land, 2.2 ha. of land for a primary school, a mixed use local centre, and a 300 space 'park and bus' facility. | |
| Staplegrove | Taunton Deane Borough Council | Site Allocations and Development Management Plan (Adopted December 2016): Policy TAU2 | Unavailable: Two outline applications were submitted in February 2016 and May 2016 respectively. Both applications received a resolution to approve in August 2017. Application 34/16/004 includes a local centre. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated a mixed-use development to include: 1,500 dwellings; convenience store (500 sqm gross); other convenience retailing (500 sqm gross); A2, A3, A4, A5 uses; community uses; 2 ha. employment land (B1b, B1c, B2, B8); a primary school. |
| East of Okehampton | West Devon Borough Council | Core Strategy DPD 2006-2026 (Adopted April 2011): Policy 22: Okehampton | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development including approximately 900 dwellings and approximately 10 ha. employment land. The allocation includes the provision of neighbourhood convenience retailing, defined in the SPD as a small food store of around 250 sqm net, primarily for top up shopping trips. |
| South and South West of Tavistock | West Devon Borough Council | Core Strategy DPD 2006-2026 (Adopted April 2011): Policy 23: Tavistock | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development including approximately 750 dwellings and approximately 13 hectares of employment land. The allocation includes the provision of neighbourhood convenience retailing. The peripheral location would also not adequately serve the core catchment |
| Sherford New Community | South Hams District Council | Sherford New Community Area Action Plan (Adopted August 2007) | Unavailable: Numerous applications relating to the Sherford new community have been submitted. Construction is underway and early phases are occupied. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a major mixed-use development to include approximately 4,000 dwellings by 2016 and 5,500 dwellings by 2026, a town centre and three neighbourhood centres. The policies make provision for circa 16,800 sqm gross of retail and service floorspace and approximately 67,000 sqm gross of commercial and employment floorspace. The intention is that the town centre will provide sufficient retail and service floorspace to meet the needs of residents for each phase of the development. This |

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| | | | | includes approximately 70% (9,000 sqm) of the New Community's floorspace for retail (Use Class A1) to provide a range of convenience and comparison goods. The peripheral location is inaccessible and would also not adequately serve the core catchment. |
| Townstal, West of Dartmouth | South Hams District Council | Dartmouth Site Allocations DPD (Adopted February 2011): Policy D1 | Unavailable: Outline permission allowed on appeal March 2016 for mixed-use development comprising up to 240 dwellings, employment land (up to 2.7 ha.), a local centre (0.4 ha.). Reference:15_51/1710/14/O. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include a local centre providing retail, health and community facilities. The proximity to Torquay town centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would not adequately serve the core catchment. |
| Peverell Park Road, Outland Road Corner | Plymouth City Council | Central Park Area Action Plan (Adopted 2008): Proposal CP05 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The site is too small for the J27 development (DOV or as a whole). The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include 26 dwellings and a 700 sqm food store. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would also not adequately serve the core catchment. |
| Royal William Yard | Plymouth City Council | Millbay and Stonehouse Area Action Plan (Adopted August 2007): Proposal MS01 | Unavailable: Permission granted February 2013 for change of use to a range of uses comprising B1, A1, A2, A3, A4, A5, D1, D2 with variation to condition 12 of planning permission reference no. 10/ /01384/FUL to now require no more than 550 sqm of floorspace to be used for a combined total of A1 and A2 Reference: 12/01449/FUL Permission granted May 2017 for() change of use to hotel and mixed-use comprising Classes A1 (600 sqm), A3 (3,100 sqm), B1 (9,425 sqm), C3 (40 dwellings), D1 (9,425 sqm), D2 (9,425 sqm). Approved May 2017. Reference | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to include 80 dwellings; 3,000 sqm office floorspace (B1a); additional retail and leisure uses; 1,800 sqm exhibition and workshop space; 7,500 sqm A3, A4 and A5 food and drink uses; a hotel. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would also not adequately serve the core catchment. |

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| | | | 16/01376/FUL. | |
| Plymstock Quarry | Plymouth City Council | North Plymstock Area Action Plan (Adopted August 2007): Proposal NP01 | Unavailable: Permission granted September 2011 (07/01904/OUT) for up to 1,684 new dwellings; approximately 1.85 ha. of land to accommodate 7,825 sqm gross of B1 and B2 uses; an extended primary school; a mixed use local centre to include A1 supermarket space of 2,000 sqm (gross) and complementary uses which could include A1/A2/A3/A4/A5/B1/C2/C3 or D1/D2 (400 sqm). Reference: 07/01904/OUT. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a new neighbourhood to include 1,500 dwellings; 21,00 sqm gross office floorspace (Use Class B1a); primary school; mixed use local centre, to include a supermarket in the region of 2,00 sqm gross and a complimentary range of small shops. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would also not adequately serve the core catchment. |
| Derriford Commercial Centre | Plymouth City Council | Plymouth and South West Devon Joint Local Plan (Submission Draft): Draft Policy PLY38 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a mix of uses comprising new commercial floorspace in the form of retail, medical/health related uses, B1 offices and workshops, leisure and community uses, education, and residential. A Draft Masterplan Report (February 2018) has been published, the illustrative plans of which includes a total of 2,693 sqm gross retail floorspace. The proximity to Plymouth City Centre would render the DOV unviable because occupiers would not want their discount brand to compete with their existing high street stores. The peripheral location would also not adequately serve the core catchment. |
| Land at West Bridgwater | Sedgemoor District Council | Local Plan (Proposed Submission Draft, January 2017): Draft Policy B3 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to provide 1,200 dwellings, primary school, a local centre (convenience store and community uses). The proximity to Clarks Village at Street would undermine the viability of the DOV. |
| East Bridgwater | Sedgemoor District Council | Local Plan (Proposed Submission Draft, January 2017) Draft Policy B4 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to provide 1,200 dwellings, primary school, and a neighbourhood centre (community facilities and/or convenience store). The proximity to Clarks Village at Street would undermine the viability of the DOV. |

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| Land at Bridgwater Gateway | Sedgemoor District Council | Local Plan (Proposed Submission Draft, January 2017): Draft Policy B5 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for mixed use development to provide approximately 300 dwellings, 6 ha. employment land (B1), a local centre with convenience store and community uses. The proximity to Clarks Village at Street would undermine the viability of the DOV. |
| Yeovil Sustainable Urban Extensions | South Somerset District Council | Local Plan 2006-2028 (Adopted March 2015): Policy YV2 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the sites. The sites are allocated for mixed use residential-led development. Each urban extension would contain a neighbourhood centre. The proximity to Clarks Village at Street would undermine the viability of the DOV. |
| Yeovil Summerhouse Village | South Somerset District Council | Local Plan 2006-2028 (Adopted March 2015): Policy YV3 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for or a mixed-use development comprising at least 278 dwellings, retail and leisure uses. The proximity to Clarks Village at Street would undermine the viability of the DOV. |
| Nightingale Close, Mead Vale | North Somerset Council | Sites and Policies Development Plan (Adopted April 2018) | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The site is approximately 1.2 ha., which is too small for the J27 development (DOV or as a whole). The proximity to Clarks Village at Street would undermine the viability of the DOV. The peripheral location would not adequately serve the core catchment. |
| Weston Villages | North Somerset Council | Core Strategy (Adopted January 2017): Policy CS30 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for two mixed use developments to deliver 6,500 dwellings and provide 37.7 ha. of Class B employment use. Each village will be anchored by a local centre (circa 1,000 sqm to 1,500 sqm). The proximity to Clarks Village at Street would undermine the viability of the DOV. The peripheral location would not adequately serve the core catchment. |
| Banwell Garden Village | North Somerset Council | West of England Joint Spatial Plan (Submission Draft, November 2017): Draft Policy 7.5 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a new garden village that would deliver approximately 1,900 dwellings, a new local centre with an appropriate range of small-scale retail services and facilities, two primary schools and a secondary school. The proximity to Clarks Village at Street would undermine the viability of the DOV. The |

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| | | | | peripheral location would not adequately serve the core catchment. |
| Churchill Garden Village | North Somerset Council | West of England Joint Spatial Plan (Submission Draft, November 2017): Draft Policy 7.6 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for a new garden village that would deliver approximately 2,675 dwellings, a new local centre with a range of retail and employment, services/facilities, three primary schools and 7.4 ha. of employment land. The proximity to Clarks Village at Street would undermine the viability of the DOV. The peripheral location would not adequately serve the core catchment. |
| Nailsea SDL | North Somerset Council | West of England Joint Spatial Plan (Submission Draft, November 2017): Draft Policy 7.7 | Availability uncertain: No evidence to suggest this site is available for development within a similar timeframe to the J27 proposals. Not sequentially preferable to J27. | Unsuitable: The J27 development does not fit with the Council's aspirations for the site. The site is allocated for 2,575 dwellings; and a new local centre with a range of retail, employment, services that is of a scale and type which is complementary to Nailsea Town Centre. The proximity to Clarks Village at Street would undermine the viability of the DOV. The peripheral location would not adequately serve the core catchment. |