

DORSET RETAIL & LEISURE STUDY - 2022 UPDATE

for:

Dorset Council

FINAL
Retail and Leisure
Needs Assessment

January 2023

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Signed:



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For and on behalf of Lambert Smith Hampton

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1. Introduction

- 1.1 Lambert Smith Hampton (**LSH**) was commissioned by Dorset Council hereafter '**DC**' to update their evidence base in respect of retailing, commercial leisure and town centres to inform the emerging Dorset Council Local Plan (2021-2038).
- 1.2 Dorset Council is a unitary local authority that came into being in April 2019. The geographical area for the unitary local authority was previously represented by the administrative areas of East Dorset, North Dorset, Purbeck and West Dorset District Councils, Weymouth & Portland Borough Council and the majority of Dorset County Council.
- 1.3 It is important to note that this update was commissioned to assess the future need ('capacity') for new retail (convenience and comparison goods) floorspace over the period to 2040 to take account of latest forecasts. It also assesses the quantitative need for new commercial leisure facilities.
- 1.4 This update has been based, and informed by, the output of the following previous studies that covered the administrative areas of East Dorset, North Dorset, Purbeck and West Dorset District Councils, and Weymouth & Portland Borough Council namely:
- Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council;
 - Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils and Update Addendum Report (March 2019); and
 - Poole and Purbeck Town Centres, Retail and Leisure Study (2014).
- 1.5 The Study assesses the future need ('capacity') for new retail (convenience and comparison goods) floorspace over the Plan period to 2040. It also assesses the quantitative need for new commercial leisure facilities. The supporting Appendices detail the accompanying quantitative analysis.
- 1.6 The overall findings of this update will be used to inform the emerging Dorset Council Local Plan.
- 1.7 The capacity update takes account of:
- the most recent population projections for the study area derived from the ONS's 2020-based Sub National Population Projections (SNPP);
 - the most up to date retail (convenience and comparison goods) expenditure per capita levels derived from Experian's MMG3 GIS;

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- Experian’s latest Retail Planner Briefing Note 19 (January 2022). This update takes account of forecasts from Experian that account for the on-going impact of the COVID-19 pandemic;
 - the most recent forecasts of expenditure growth and ‘non-store’ retail sales (otherwise referred to as Special Forms of Trading¹) based on Experian’s latest Retail Planner Briefing Note 19 (January 2022);
 - an update and overview of key retail trends;
 - the current pipeline of committed new retail floorspace as revised by DC.
- 1.8 It should be noted at the outset that capacity forecasts carried out over a long period of time are inherently less certain and should be treated with caution. This is principally due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise DC that greater weight should be placed on the short term forecasts carried out over a three-five year period in accordance with the NPPG and especially currently when the impact of the pandemic is still being realised. Notwithstanding this, account should also necessarily be taken of the forecast growth over the development plan period.
- 1.9 For ease of reference this report is structured as follows:
- **Section 2** updates and reviews the national and local planning policy context material to retail planning and town centres.
 - **Section 3** highlights current trends that are driving the dynamic changes in the retail and leisure sectors.
 - **Section 4** sets out the key assumptions and forecasts underpinning the quantitative need (‘retail capacity’) assessment.
 - **Section 5** details the updated capacity outputs based on LSH’s in-house **CREAT**^e (excel-based) capacity model.
 - **Section 6** sets out the updated findings of the commercial leisure and other town centre uses ‘gap’ assessment. This looks at current leisure provision and the potential need over the plan period for new food and beverage uses, cinema, gyms, etc.
 - **Section 7** summarises the findings and advice of this update.

¹ Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS)

2. Planning Policy Overview

- 2.1 To help inform the preparation of this study, this section provides a summary of the key national and local planning policies pertaining to retail, leisure and other main town centre uses.

NATIONAL PLANNING POLICY & GUIDANCE

- 2.2 The National Planning Policy Framework (NPPF) was revised on 20 July 2022. This sets out the government's planning policies for England and how these are expected to be applied. This revised Framework replaces the previous National Planning Policy Framework published in March 2012, revised in July 2018 and updated in February 2019.

National Planning Policy Framework (NPPF)

- 2.3 The latest update of the NPPF sets out the Government's planning policies for England. Planning law requires that applications for planning permission be determined in accordance with the development plan², unless material considerations indicate otherwise. The NPPF must therefore be considered in plan-making and is a material consideration in planning decisions.
- 2.4 The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development, which is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs³. The Framework (paragraph 11) sets out the Government's view of what the presumption in favour of sustainable development means in practice. For plan-making: *"...all plans should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects.."*
- 2.5 Chapter 3 ('Plan-Making') of the Framework provides guidance to local authorities on preparing local plans. Paragraph 20 states that policies should set out an overall strategy for the pattern, scale and design quality of places and make sufficient provision for new sustainable development. It requires that strategic policies should look ahead over a minimum 15 year period from adoption **except in relation to town centre development**

² Defined in section 38 of the Planning and Compulsory Purchase Act 2004, and includes adopted local plans, neighbourhood plans that have been made and published spatial development strategies, together with any regional strategy policies that remain in force. Neighbourhood plans that have been approved at referendum are also part of the development plan, unless the local planning authority decides that the neighbourhood plan should not be made.

³ Resolution 42/187 of the United Nations General Assembly

(see below). Where larger scale developments such as new settlements or significant extensions to existing villages and towns form part of the strategy for the area, policies should be set within a vision that looks further ahead (at least 30 years), to take into account the likely timescale for delivery (paragraph 22). In preparing development plans, “*policies should be underpinned by relevant and up-to-date evidence*” (paragraph 31). To ensure the local plans and spatial strategies are relevant they should be reviewed at least once every five years and updated as necessary (paragraph 33).

- 2.6 Chapter 7 (*‘Ensuring the vitality of town centres’*) provides guidance on plan-making and decision-taking for retail and other town centre uses. Paragraph 86 states that “*planning policies and decisions should support the role that town centres play at the heart of local communities*” and sets out criteria that local authorities should consider when preparing planning policies. These include: (a) defining a network and hierarchy of centres; (b) defining the extent of town centres and Primary Shopping Areas (PSAs); (c) retaining and enhancing existing markets; and (d) allocating a range of suitable sites in town centres to meet the sales and type of development likely to be needed, “**looking at least ten years ahead**”.
- 2.7 Paragraphs 87-91 specifically set out the requirement to apply the sequential and impact tests to determine applications for new retail, leisure and main town centres that are neither in an existing centre, nor in accordance with an up-to-date development plan.
- 2.8 Other Chapters in the NPPF are also relevant to the preparation of this study, and to the Council’s plan-making and decision-taking policies for its network and hierarchy of centres. For example, Chapter 8 (*‘Promoting healthy and safe communities’*) sets out the need to achieve healthy, inclusive and safe places; including the need to plan positively for the provision and use of shared spaces, community facilities (such as local shops) and other local services to enhance the sustainability of communities and residential environments (paragraph 93a).

Planning Practice Guidance (PPG)

- 2.9 The latest update of the Planning Practice Guidance (PPG) was issued in September 2020. It provides specific guidance on plan-making and decision taking for retail, leisure and town centre uses, including guidance on Permitted Development Rights (PDR) and the new Use Classes Order (‘UCO’) that came into effect on 1st September 2020⁴ (see below). The Guidance supports the policies and provisions of the NPPF; placing significant weight on the development of positive plan-led visions and strategies for town centres.

⁴ Paragraph: 007 Reference ID: 2b-007-20190722. Also refer to: Town and Country Planning (General Permitted Development) (England) Order 2015, as amended.

- 2.10 In terms of planning for town centres, the PPG states that a wide range of complementary uses can, if suitably located, help to support the vitality and viability of town centres. These include residential, employment, office, commercial, leisure/entertainment, healthcare and educational development. Evening and night-time activities also have the potential to increase economic activity within town centres and provide additional employment opportunities.
- 2.11 The PPG (paragraph 004) sets out the importance of evidence-based strategies and visions for town centres to help establish their role and function over the plan period, the need for new retail, leisure and town centre uses, and other interventions. However, given the uncertainty in forecasting long-term retail trends and consumer behaviour, the PPG states that forecasts **“...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed”**⁵. In those cases where development cannot be accommodated in town centres, the PPG requires planning authorities to plan positively to identify the most appropriate alternative strategy for meeting the identified need, having regard to the sequential and impact tests⁶. The PPG also sets out several Key Performance Indicators (KPIs) that *“may be relevant in assessing the health of town centres, and planning for their future”*⁷.

Reform of Use Classes Order & Permitted Development Rights

- 2.12 The Government has issued a series of reforms to the planning system since the previous Councils’ studies in 2017 and 2018. The reforms principally relate to Permitted Development Rights (PDR) and the Use Classes Order (UCO)⁸, alongside the Government’s White Paper *“Planning for the Future”* (published in August 2020) and the *2021 Planning Reform Bill*.
- 2.13 The new UCO came into effect from 1st September 2020 and is relevant to the preparation of this study and the Council’s plan-making and decision-taking on new retail, leisure and town centre uses. The new UCO amended and revoked a number of use classes under the 1987 Order, and has replaced them with much broader use classes. In summary, the main reforms introduced by the new UCO include:

⁵ Paragraph: 004 Reference ID: 2b-004-20190722

⁶ Refer to Paragraph: 005 Reference ID: 2b-005-20190722. Paragraph 010A ID: 2b-010-20190722 also provides a checklist for local planning authorities to consider when applying the sequential test.

⁷ Paragraph: 006 Reference ID: 2b-006-20190722

⁸ The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020/757 was laid before Parliament on 21st July 2020 and amended the Town and Country Planning (Use Classes) Order 1987.

- a new **Class E (commercial, business and service uses)**: which subsumes the former Use Classes A1 (shops), A2 (financial and professional services) and A3 (restaurants and cafés). It also incorporates: the former Class B1 (commercial, business and service uses), comprising office, research and development and light industry; Class D1(non-residential institutions) in part, comprising medical or health services, clinics, crèches, day nurseries and day centres; and Class D2 (assembly and leisure) in part, comprising gyms or areas for indoor recreation.
- a new **Class F1 (learning and non-residential institutions)**: which includes some of the former uses under Class D1 (non-residential institutions), including museums, public libraries, art galleries, schools, and places of worship.
- a new **Class F2 (local community uses)**: which comprises (former Class A1) shops defined as being “...not more than 280 sqm mostly selling essential goods, including food, and at least 1km from another similar shop”. This Use Class also includes former Class D2 (assembly and leisure), such as meeting places/halls, indoor/outdoor swimming baths, skating rinks, and outdoor sport and recreation.
- an extension to the **Sui Generis** uses (which fall outside the specified use classes) to include the former Use Classes A4 (pubs and drinking establishments) and A5 (hot food takeaways). It also incorporates some uses previously classified under D2 (assembly and leisure), including cinemas, concert halls, live music venues, bingo and dance halls.

2.14 The Government also consulted on a variety of changes to PDR in December 2020, including the Class E to Class C3 (residential) PDR. This PDR replaces the two existing commercial to residential PDRs under **Class ‘O’ (office to residential)** and **Class ‘M’ (conversion of shops, financial services, betting offices and pay day loan or mixed uses to residential)**. The Order⁹ introducing the new PDR under new **Class ‘MA’** will be subject to prior approval applications. It does contain some conditions and limitations informed by the consultation responses. For example, it only applies to buildings that have been vacant for a least three continuous months, to help protect existing businesses. It does not apply to buildings with a cumulative floorspace of more than 1,500 sqm or to listed buildings, but will apply in Conservation Areas.

2.15 In launching the reforms the Government announced that the regulations will give “...greater freedom for buildings and land in our town centres to change use without planning permission and create new homes from the regeneration of vacant and redundant

⁹ Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021

*buildings*¹⁰. These changes are relevant to this study. It should be noted that reference is still made throughout the study to classifications defined by the previous 1987 UCO.

Article 4 Directions

2.16 The expansion of PDR allowing fast-track consents for conversions from commercial property to housing without the need for a planning application has resulted in concerns for Local Planning Authorities (LPAs). This includes the introduction of the new Class MA PDR which allows conversions from the new E use class that covers a range of town centre commercial uses, including shops and offices, to residential.

2.17 The latest revision to the NPPF has tightened the rules on the ability of LPAs to secure Article 4 directions (A4Ds). Paragraph 53 of the NPPF states:

“The use of Article 4 directions to remove national permitted development rights should:

- *where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)*
- *in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)*
- *in all cases, be based on robust evidence, and apply to the smallest geographical area possible.”*

2.18 The resulting implication is that a higher threshold has been set for the use of A4Ds. LPAs will need to provide much more evidence to justify an A4D. Press reports¹¹ indicate that a survey of London’s 35 local planning authorities revealed that 17 of them have either introduced or have plans to introduce an A4D to prohibit Class MA permitted development rights to convert high street units to housing, citing concerns over a loss of business space and poor-quality homes. These will come into effect from 31 July 2022 when any A4Ds introduced on the old office-to-residential PDR will cease to have effect.

DEVELOPMENT PLAN CONTEXT

¹⁰ <https://www.gov.uk/government/news/pm-build-build-build>

¹¹ “London councils to ban new PDR” – Property Week (19/08/2021)

- 2.19 By way of background and locational context influencing planning policy, the Dorset Council area previously comprised of five local authority areas at district level, namely Weymouth and Portland, West Dorset, North Dorset, Purbeck and East Dorset. Adjoining these authorities, to the east, were Christchurch Borough Council and the unitary authorities of Bournemouth and Poole. In 2019, together with Dorset County Council, these were all replaced by two new unitary authorities: Dorset Council and Bournemouth, Christchurch and Poole Council (BCP). Consequently, there has been some reorganisation as Christchurch had previously worked in partnership with East Dorset. Nevertheless, the local plans for the legacy authorities remain extant at the time of writing this report.
- 2.20 Notwithstanding the above, the emerging Dorset Council Local Plan Regulation 18 document represents the developing local plan for the new Dorset Council area. In terms of its progress, the options consultation was completed in March 2021. This local plan will eventually replace the following suite of existing local plans for the legacy authorities:
- Christchurch and East Dorset Local Plan Part 1: Core Strategy (2014)
 - East Dorset Local Plan (2002): Saved policies only
 - North Dorset Local Plan Part 1 (2016)
 - North Dorset District-Wide Local Plan (2003): Saved policies only
 - Purbeck Local Plan Part 1 (2012)
 - Swanage Local Plan (2017)
 - West Dorset, Weymouth and Portland Local Plan (2015)
- 2.21 It should be noted that that the adopted (or 'Made) neighbourhood plans also form part of the statutory development plan for the Dorset Council area. These include:
- Bere Regis (June 2019)
 - Blandford + (including Blandford Forum) (May 2021)
 - Bridport (May 2020)
 - Chickerell (May 2021)
 - Gillingham (July 2018)
 - Portland (including Easton & Fortuneswell) (May 2021)
 - Shaftesbury (May 2021)
 - Sturminster Newton (January 2019)
 - Wareham (November 2021).
- 2.22 Furthermore, the Weymouth Town Centre Masterplan SPD (2015) has also been adopted in support of policies in the development plan for the Dorset Council area
- 2.23 The following review focuses on the emerging Dorset Council Local Plan Regulation 18 document.

Dorset Council Local Plan (2021) Volume 1 - Strategy & Topics

- 2.24 The overarching vision for the newly formed Dorset Council under the emerging Dorset Council Local Plan Consultation (January 2021) is focussed on the environmental quality of the area – its rural landscapes, its biodiversity, its rich heritage, its coast and its picturesque towns and villages. It is stated that:

By 2038 this will be improved with high quality developments that bring the homes, jobs and supporting infrastructure that Dorset needs. We will reduce our carbon footprint and seek to enhance our natural environment.

The main centres for economic activity of south east Dorset and the Dorchester to Weymouth corridor will be enhanced. Excellent employment opportunities will exist at the towns with sustainable travel opportunities provided to them from the surrounding villages.

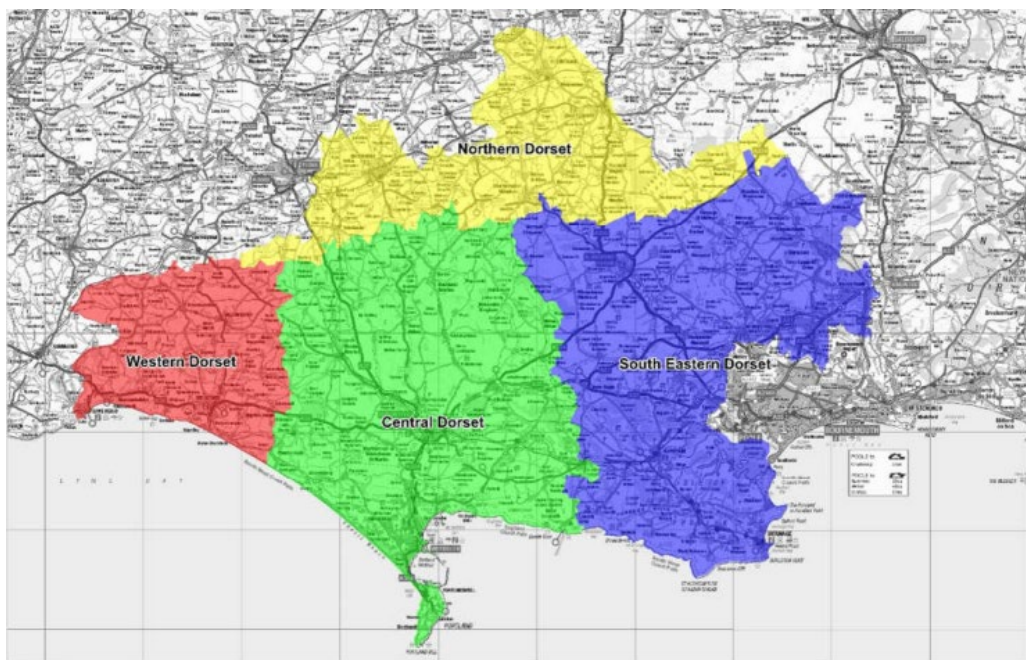
The towns across the area will act as hubs for their rural hinterlands providing many of the services that people need on a frequent basis.

- 2.25 In supporting this vision, the spatial strategy under this Plan gives regard to the following factors (amongst others):
- the way the housing markets and economy differ and interact across the area;
 - the supply of developable sites for housing, employment and other uses; and
 - the role played by the area's existing settlements.

Housing

- 2.26 Under **Policy DEV 1** of the Local Plan Consultation (2021), the housing requirement and the need for employment land in Dorset over the period 2021 to 2038 is defined as follows:
- a deliverable supply of housing land to accommodate a minimum of 30,481 dwellings, which will be delivered at a minimum average annual rate of 1,793 dwellings per annum; and
 - a minimum of 131 hectares of employment land.
- 2.27 The four broad Functional Housing and Economic Areas in Dorset are defined as follows:

Figure 2.1: Representation of the Functional Housing and Economic Areas in Dorset



Source: Dorset Council Local Plan Consultation (January 2021), Figure 2.2

2.28 Within the context of the functional housing / economic areas, the settlement hierarchy is set out as follows:

- **Tier 1 - Large built-up areas:** comprising in eastern Dorset, the main built-up area of the Bournemouth, Christchurch and Poole conurbation within the inner boundary of the South East Dorset Green Belt; and in western Dorset, the county town of Dorchester and the coastal resort of Weymouth, which is the largest urban area in rural Dorset; and
- **Tier 2 - Towns and other main settlements:** comprising market and coastal towns across Dorset and 'other main settlements' mostly in eastern Dorset and inset from the Green Belt, close to the main built up area of Bournemouth, Christchurch and Poole.

Figure 2.2: Tiers 1 And 2 of The Settlement Hierarchy In Dorset Arranged by Functional Area

Tier 1: Large built-up areas		
South Eastern Dorset Functional Area	Bournemouth, Christchurch & Poole conurbation (including the contiguous settlements of Upton and Corfe Mullen which are in Dorset)	
Central Dorset Functional Area	Dorchester	Weymouth (including Littlemoor)
Tier 2: Towns and other main settlements		
South Eastern Dorset Functional Area	Blandford	Wimborne Minster and Colehill
	Ferndown and West Parley	Verwood
	St Leonards and St Ives	West Moors
	Swanage	Wareham
Central Dorset Functional Area	Chickerell	Portland Settlements: Castletown; Chiswell; Easton; Fortuneswell; Grove; Southwell; Wakeham; and Weston
Northern Dorset Functional Area	Gillingham	Sturminster Newton
	Shaftesbury	Stalbridge
	Sherborne	
Western Dorset Functional Area	Beaminster	Lyme Regis
	Bridport	

Source: Dorset Council Local Plan Consultation (January 2021), Figure 2.3

2.29 The third and fourth tiers in the hierarchy are:

- **Tier 3 – Villages with 'Local Plan Development Boundaries' or villages excluded from (inset within) the Green Belt.** These are typically larger villages which have a population of 500 or more and at least some facilities enabling some day-to-day needs to be met locally; and
- **Tier 4 – Villages without 'Local Plan Development Boundaries' or villages included within (washed over by) the Green Belt.** These are typically smaller villages which have a population of less than 500 and few facilities. This tier includes villages with a 'neighbourhood plan development boundary'.

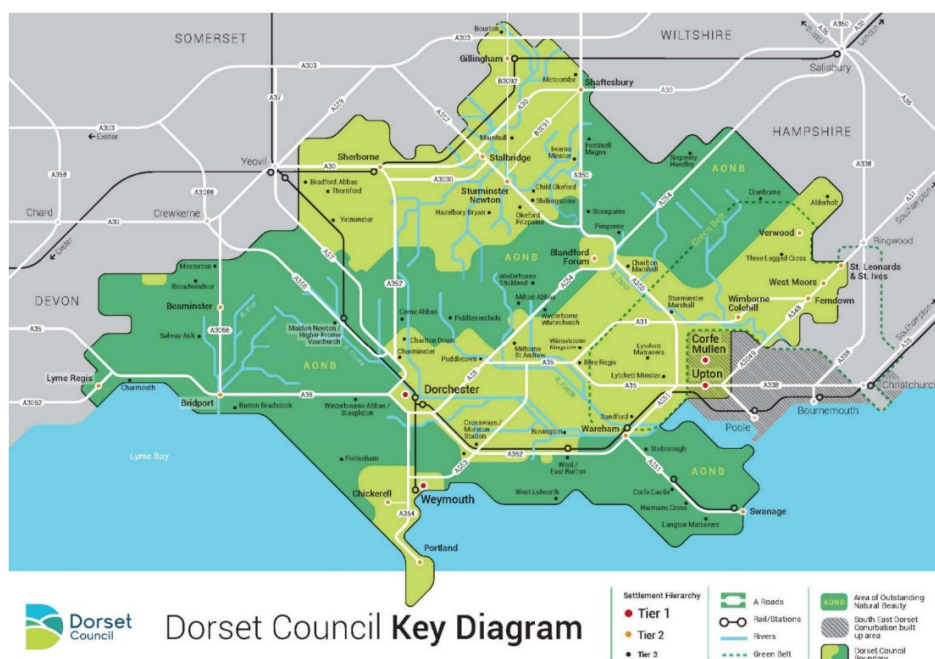
Figure 2.3: Tier 3: The Larger, More Sustainable Villages Arranged by Functional Area

South Eastern Dorset Functional Area	Central Dorset Functional Area	Northern Dorset Functional Area	Western Dorset Functional Area
Alderholt	Broadmayne/ West Knighton	Bradford Abbas	Burton Bradstock
Bere Regis	Cerne Abbas	Bourton	Broadwindsor
Bovington	Charlton Down	Child Okeford	Charmouth
Charlton Marshall	Charminster	Fontmell Magna	Mosterton
Corfe Castle	Crossways / Moreton Station	Hazelbury Bryan	Salway Ash
Cranborne	Maiden Newton / Higher Frome	Iwerne Minster	
Harmans Cross	Vauchurch	Marnhull	
Langton Matravers	Milborne St Andrew	Motcombe	
Lytchett Matravers	Milton Abbas	Okeford Fitzpaine	
Lytchett Minster	Piddletrenthide	Shillingstone	
Pimperne	Portesham	Stourpaine	
Sandford	Puddletown	Thornford	
Sixpenny Handley	Winterborne Stickland	Yetminster	
Stoborough	Winterbourne Abbas / Winterbourne Steepleton		
Sturminster Marshall			
Three Legged Cross			
West Lulworth			
Winterborne Kingston			
Winterborne Whitechurch			
Wool / East Burton			

Source: Dorset Council Local Plan Consultation (January 2021), Figure 2.4

2.30 The map below illustrates where the settlements are, what tier and the infrastructure / transport network:

Figure 2.4: Dorset Council Key Diagram



Source: Dorset Council Local Plan Consultation (January 2021), Figure 2.5

- 2.31 To fulfil this level of growth **Policies DEV2-DEV5** set out how this will be delivered in the four Dorset functional areas. **Policy DEV2** covers how housing growth in South Eastern Dorset will be delivered, including through windfall sites and infilling Green Belt release.
- 2.32 The proposals for significant growth in Central Dorset have been carried forward, namely at Poundbury (Dorchester) and at Weymouth. **Policy DEV3** 'Growth in the central Dorset functional area' states that housing growth will be delivered in a variety of ways including:
- at the county town of Dorchester, which includes major urban extensions (I)
 - town centre regeneration and a major urban extension at Littlemoor (II)
 - through regeneration within the settlements on Portland (III)
 - significant expansion of the town of Chickerell (IV)
- 2.33 In Northern Dorset (**Policy DEV4**) this will be delivered at the market towns of Gillingham and Sherborne, including through major urban extensions, in addition to smaller town expansions and infilling / intensification. Lastly, **Policy DEV5** outlines housing growth delivery in western Dorset which includes at the market town of Bridport through a major urban extension at Vearse Farm, small-scale expansion of the coastal town of Lyme Regis and through windfall and infilling.
- 2.34 The estimated housing from consented existing allocations by functional area is (paragraph 2.7.12):
- South Eastern Dorset functional area 7,544 new homes

-
- Central Dorset functional area 11,202 new homes
 - Northern Dorset functional area 4,359 new homes
 - Western Dorset functional area 1,469 new homes

Employment

- 2.35 The emerging local plan suggests that between 131 and 151 hectares would be required in order to accommodate for an expected increase of around 21,000 new jobs over the period to 2038 as per **Policy DEV 1** (paragraph 2.8.1).

Town Centre, Retail and Primary Shopping Areas

- 2.36 Section 5 of the emerging plan on “*town centres and retail development*” recognises town centres as being ‘*at the heart of communities*’ which provide accessible shops and services, employment and leisure. The vitality and viability of centres can foster civic pride, promote local identity and provide wider economic and social benefits (paragraph 5.5.1).
- 2.37 The emerging plan also recognises the impact COVID-19 has had on town centres and that town centres began changing even pre-pandemic, for a myriad of reasons, and will require ‘*long-term major restructuring*’. The retail sector in particular is facing significant challenges. The emerging plan states that there is a need “*for town centres to be redefined and adapted to support a greater diversification of uses, including residential, to boost visitor numbers and footfall, dwell time and spend as the role of retail as the dominant function of town centres diminishes*” (paragraph 5.5.2).
- 2.38 In terms of future forecasts, the Council acknowledges the “*...need to review future floorspace requirements due to the uncertainty in forecasting long-term retail trends and consumer behaviour. Further evidence is needed to inform future stages of the local plan*”. (paragraph 5.5.6)
- 2.39 **Policy ECON3** on ‘*Hierarchy of Centres and the sequential test*’ states that the town, district and local centres are to be the focus for town centre uses. New centres should not adversely affect the vitality and viability of other centres.

Figure 2.5: Dorset Unitary Area: Network and Hierarchy of Centres

Category	Definition	Centres
Town centres	Town centres are the principal centres within an area. In rural areas they can often be found within market or coastal towns. They function as important service centres, providing a range of facilities and services for extensive rural catchment areas.	<ul style="list-style-type: none"> • Blandford Forum • Bridport • Dorchester • Ferndown • Gillingham • Lyme Regis • Shaftesbury • Sherborne • Sturminster Newton • Swanage • Verwood • Wimborne Minster • Wareham • Weymouth
District centres	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks and restaurants, as well as local public facilities such as a library.	<ul style="list-style-type: none"> • Queen Mother Square, Poundbury, Dorchester • Stalbridge • Upton • West Moors
Local centres	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, and a pharmacy. Other facilities could include a hot-food takeaway, hairdressers and launderette. In rural areas, large villages may perform the role of a local centre.	<ul style="list-style-type: none"> • Abbotsbury Road, Westham, Weymouth • Beaminster • Bere Regis • Chickerell • Corfe Castle • Corfe Mullen • Easton Square, Easton, Portland • Fortuneswell, Portland • Littlemoor Centre, Weymouth • Lodmoor Hill, Weymouth • Lytchett Matravers • Marnhull • Portland Road, Wyke Regis, Weymouth • Southill Centre, Weymouth • West Bay • West Parley • Wool

Source: Dorset Council Local Plan Consultation (January 2021); Figure 5.2

2.40 **Policy ECON4** considers how town centre impact assessments are to be produced to support proposals for retail and leisure developments that are above the local gross floorspace thresholds and in locations outside of town centres (as defined by the policies map). Proposals with adverse impacts on existing centres will likely be refused.

2.41 Management of centres, Primary Shopping Areas (PSA) and markets are covered in **Policy ECON5** which highlights proposals for retail and other town centre uses in primary shopping areas will be supported where a positive contribution is made to the vitality, viability and diversity of the PSA. It also includes that active ground floor uses are either provided or maintained.

Tourism

2.42 Tourism¹² is a key part of Dorset's local economy and the sector is growing, playing an important role in job creation and a sustainable economy. Tourism provides 42,118 jobs which is the equivalent to 12% of all employment within the area, contributing approximately £863 million to the local economy annually (paragraph 5.8.2).

2.43 The Council recognises the importance of tourism and looks favourably on investment in new and improved attractions, facilities and accommodation. The plan states that "*tourism development is regarded as a town centre use and the preferred location for large new tourist attractions and facilities, which are compatible with urban areas, are town centres*" The sequential test, as set out in **Policy ECON3**, will be applied to tourist attractions and facilities which are compatible with urban areas (paragraph 5.8.5).

2.44 **Policy ECON6** '*Supporting vibrant and attractive tourism*' outlines that tourism development be focused in sustainable locations, larger attractions being located in town centres. It concludes that development which would enhance the visitor economy and "*increase the quality and diversity of the tourism offer in the local area will be supported. Proposals that deliver a wider environmental or community benefits will be encouraged*" (Policy ECON6).

Dorset Council Local Plan (2021) Volume 2 - Functional Housing and Economic Areas

South Eastern Dorset Functional Area

2.45 The South Eastern Dorset Functional Area includes the towns and main settlements of Blandford (Forum and St Mary), Ferndown/West Parley, St Leonards & St Ives, Swanage, Verwood, West Moors, Wareham and Wimborne Minster/Colehill. Also included are Corfe Mullen and Upton which are the only parts of the multi-centred South East Dorset Conurbation that lie within the Dorset Council area, the remainder largely being within the BCP Council area.

¹² Tourism refers to all activities of visitors, including overnight visitors and same day visitors, visits for business purposes as well as for holidays and recreation.

- 2.46 Blandford Forum is a market town and its centre is classified as a 'town centre' within the retail hierarchy for the plan area. It provides a wide range of shops, services and facilities. It has an outdoor weekly market which takes place in the Market Place on Thursdays and Saturdays. Based on previous retail assessments there is an estimated need "*for 2,700m² net of new comparison goods floorspace and a limited need identified for additional convenience floorspace with a requirement for 230m² net by 2036*". There is also the recognition that "*there is a need to refresh the evidence for retail need across the whole plan area to take into account the impact of changes in shopping patterns and the impact of Covid-19 pandemic. This will be undertaken to inform the next stage of the plan's production*" (paragraph 10.4.5).
- 2.47 Wareham is identified as a 'town centre' in the retail hierarchy for the plan area. The town centre performs an important role as the retail and service centre for the Purbeck area, although the town's proximity to Poole, Bournemouth and Dorchester results in some leakage to these competing centres. Based on previous retail assessments "*the need for additional retail floorspace in this area is limited and focused on the existing centres of Wareham and Swanage. It is estimated that around 900m² of additional convenience (food) retail space will be needed at Wareham over the plan period*". Furthermore that "*there is not expected to be any additional comparison (non-food) retail need however the evidence of need will be refreshed to inform the production of the next stage of the local plan and take into account changes in shopping patterns and the impact of the Covid-19 pandemic*" (paragraph 15.4.3).
- 2.48 Swanage is the largest town in the Isle of Purbeck area, being identified as a 'town centre' within the retail hierarchy. It is a popular tourist destination, attracting a significant number of staying visitors, boosting the population during peak holiday season. It forms an important service centre for the remote parts of the Isle of Purbeck. Based on previous retail assessments "*there is limited need for additional comparison (non-food) floorspace, however there is a need for additional convenience (food) floorspace to serve both Wareham and Swanage. The need should be split between the two towns with a convenience store of around 700 m² being provided within the Swanage town centre either as a new stand-alone store or as an extension to an existing unit*".
- 2.49 Wimborne town centre serves a wide area and acts as a major tourist destination. The main retail area in Wimborne is designated as a 'town centre'. The town centre already has an above average provision of comparison shops, with a high number of shops being independent specialists, and a low number of vacant units. This diverse range of shops is a key driver for people visiting the town centre. Based on previous retail assessments "*there will be a need for an additional 2,500m² of convenience retail space within the combined town over the plan period along with an additional 2,500m² of comparison (non-food) space. However, given recent changes in shopping patterns and the impact of the Covid19*

pandemic, these estimates of need will need to be refreshed prior to the plan moving to the next stage in its production” (paragraph 17.4.4).

- 2.50 Ferndown is allocated as a ‘town centre’ within the top tier of the retail hierarchy. It provides an important shopping, service and employment function. It has a reasonable selection of retail and service uses and its key roles include the provision of convenience retail. The town has a relatively small range of comparison shops, primarily comprising small independent specialist traders. Based on previous retail assessments *“There is an estimated need for around 500m² of convenience retail within the Ferndown area over the next 15 years and an estimated need for around 2,700m² of additional comparison retail. The retail projections will however need to be refreshed to reflect the levels of population growth expected in each area, to respond to recent changes in shopping patterns and the impact of the Covid-19 pandemic ”* (paragraph 11.4.2).
- 2.51 Verwood is designated as a ‘town centre’, within the top tier of the retail hierarchy and, *alongside* Ferndown and Wimborne. It is one of the main centres serving the eastern part of Dorset and a focal point for other important services and serves an important employment function. Based on previous retail assessments and projected *requirements* for East Dorset, Verwood is stated to be *“one of the main locations for comparison retail floorspace provision in the area and applications that enhance the town centre offer”* (paragraph 14.4.5).
- 2.52 West Moors is designated as a ‘district centre’ within the retail hierarchy. It provides local services primarily serving its local catchment. It is envisaged that small amounts of new retail development will come forward over the plan period to enhance the existing provision and these should be focused near to the existing centre (paragraph 16.3.2).
- 2.53 Upton is also designated as a ‘district centre’ and lies to on the western edge of the Poole and Bournemouth conurbation. It is largely suburban in character and is considered to have its own identity and not simply a suburb of Poole. Whilst it lacks a defined ‘heart’, the main facilities of the library, health centre, church, community centre and post office are grouped around the central crossways junction of Dorchester Road/Poole Road and Blandford Road. An enhancement scheme is therefore planned for this central location, forming a new civic space and providing a new central focus to Upton (paragraph 9.4.1).

Central Dorset Functional Area

- 2.54 The Central Dorset Functional Area is centred on the two large built-up areas of Dorchester and Weymouth. It also includes the town of Chickereil to the west of Weymouth and the Isle of Portland.

- 2.55 Dorchester is the county town of rural Dorset and sits at the top of the retail hierarchy in the plan area alongside Weymouth town centre. Dorchester acts as an important retail, employment and service centre, having an emphasis on workers commuting from nearby towns, particularly Weymouth. Based on previous retail assessments the town strategy states *“there will be a need to provide for approximately 570m² of food (convenience) retail space and approximately 6,860m² of non-food (comparison) retail space. However further understanding of the impact of the Covid-19 pandemic on the needs of the town centre and the other centres across the area, is necessary to inform the next stage of the plan’s production”* (paragraph 23.4.5).
- 2.56 Weymouth, a seaside resort, is the largest town in the network and hierarchy of town centres. It is a significant tourist and recreation destination and is a place where a range of businesses are based in the plan area. Based on previous retail assessments the town strategy states there is *“projected need for convenience retail within Weymouth as a whole is for just over 2,000m² and comparison (non-food) retail needs, at around 7,300m²”* (paragraph(s) 24.5.2 & 24.5.3).
- 2.57 The Weymouth Town Centre Masterplan (2015) is a supplementary planning document that has been adopted by the Council in support of policies in the development plan for the Dorset Council area. This document at the time set out proposals to transform Weymouth town centre with up to 1,000 new homes and 2,700 jobs across five town centre sites covering 58 hectare (at Lodmoor Gateway, Station Gateway, Commercial Road, Harbourside and Peninsula). It is understood that further work will be undertaken to deliver the potential development proposals.
- 2.58 Queen Mother Square, Poundbury, is a defined district centre within Central Dorset. Poundbury has proposals for significant housing growth carried forward from the adopted Joint Local Plan for the former West Dorset and Weymouth & Portland local authority areas. This will be through major urban extensions at Poundbury and North of Dorchester. In addition further commercial development is anticipated at Poundbury under Policy DEV3 of the Dorset Council Local Plan.

Northern Dorset Functional Area

- 2.59 The three largest towns are Gillingham, Shaftesbury and Sherborne with a good range of services, followed by the smaller towns of Stalbridge and Sturminster Newton with a more limited range of services. Issues include a low wage economy, an ageing population, a lack of affordable housing and in the case of Sherborne, commuting to and from Yeovil.
- 2.60 Gillingham is the largest town in the Northern Dorset functional area. Together with its near neighbour Shaftesbury, it serves a wide hinterland of surrounding Dorset villages, plus villages in the neighbouring counties of Wiltshire and Somerset. Based on previous retail

assessments its town strategy states that *“there is an estimated need for between 1,150–1,840m² of new convenience goods floorspace and 1,102m² new comparison goods floorspace in the town. In addition, the introduction of a street market to create more of a draw and improvement of the pedestrian routes to and through the town centre would help to add town centre vitality”* (paragraph 29.4.3).

- 2.61 Although Shaftesbury is smaller than Gillingham, its compact historic town centre provides a complementary role to that of its neighbour, particularly in terms of tourism. Based on previous retail assessments its town strategy provides that *“there is little need for additional convenience floorspace in the town however there is a need for an estimated 1,730m² of comparison goods and other leisure uses floorspace”*. Additionally that *“Despite Shaftesbury’s importance as a tourist/visitor destination, there is a poor choice of leisure services (including cafes and restaurants)”*.
- 2.62 Sherborne is a historic market town and has a wide range of facilities including a large number of small specialist and independent businesses. Its town centre strategy provides that the *“town has a good convenience provision with larger shops including Waitrose and Sainsbury’s, supported by other smaller grocers, delicatessens and bakers. There are also several markets which provide additional diversity including the Sherborne Vintage Market and Sherborne Farmers’ Market which are both held at regular intervals each month.”* Based on previous retail assessments the town strategy states there is an identified *“need for 1,245m² net of new comparison goods floorspace in the town by 2036. There was however limited need identified for additional convenience floorspace with a requirement for only 55m² net by 2036”* (paragraph 31.4.4).
- 2.63 Sturminster Newton is defined as a ‘town centre’ within the retail hierarchy. It is stated to have an adequate existing provision of convenience retail and a good range of comparison retailers. Based on previous retail assessments there is a projected convenience need for only around 220m² and for comparison goods an additional 645m² (paragraph 33.4.3).
- 2.64 Stalbridge is a defined ‘district centre’ and is the smallest town in Dorset. The vision for Stalbridge is to retain its attractive historic character and continue to respect the character of the surrounding countryside, whilst delivering new homes to meet housing needs (paragraph 32.2.1)

Western Dorset Functional Area

- 2.65 The Western Dorset Functional Area is centred on the historic market town of Bridport and includes the small market town of Beaminster and the coastal resort of Lyme Regis.
- 2.66 Bridport forms an important role as the main service centre for the western part of the plan area. It is identified as a ‘town centre’ in the retail hierarchy for the plan area and performs

an important role as the retail and service centre for the surrounding rural area in western Dorset. Based on previous retail assessments the town strategy states there is a “*limited need for new retail floorspace up to 2036; 175m² net of new convenience goods floorspace and around 2,730m² net of new comparison goods retail.*” (paragraph(s) 36.4.5 & 36.4.6).

- 2.67 Lyme Regis is classified as a ‘town centre’ in the retail hierarchy. The types of shops/amenities in the town centre are very much geared towards the tourism industry with the proportion of leisure services, restaurants, cafes and pubs being higher than average. Based on previous retail assessments the town strategy states there is an “*identified a need for 245m² net of new comparison goods floorspace in the town and a limited need identified for additional convenience floorspace with a requirement for only 68m² net by 2036*” (paragraph 37.4.5).
- 2.68 Beaminster lies entirely within the Dorset AONB. It fulfils the role and function of a ‘local centre’ with a relatively small number of shops and services serving the local population. The town centre boundary is drawn around the eastern section of Hogshill Street, The Square, and short stretches of North Street, Church Street and Fleet Street, including the Town Council offices. Based on previous retail assessments there is “*limited need for new retail floorspace up to 2036; 28 m² net of new convenience goods floorspace and 98 m² net of new comparison goods retail. The historic nature of Beaminster, and it’s very tightly configured centre, mean there are limited opportunities for additional retail development*” (paragraph 35.4.3).

Summary

- 2.69 The underlying objectives of national, regional and local plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations ‘first’.
- 2.70 This policy objective is even more critical at this point in time as town centres and high streets are facing increasing economic challenges from competing forms of retailing. These include the long term competition from out-of-centre shopping and leisure facilities and, over the last decade, the growth in online shopping. These trends and challenges have been further accelerated by the COVID-19 pandemic, and are covered in more detail in the next section.
- 2.71 Additionally, the emerging Dorset Council Local Plan Regulation 18 document has recognised the need to review future floorspace requirements. **Section 5** of this report therefore seeks to provide an update to retail need for the Dorset Council area based on the latest data and forecasts.

3. Retail and Town Centre Trends

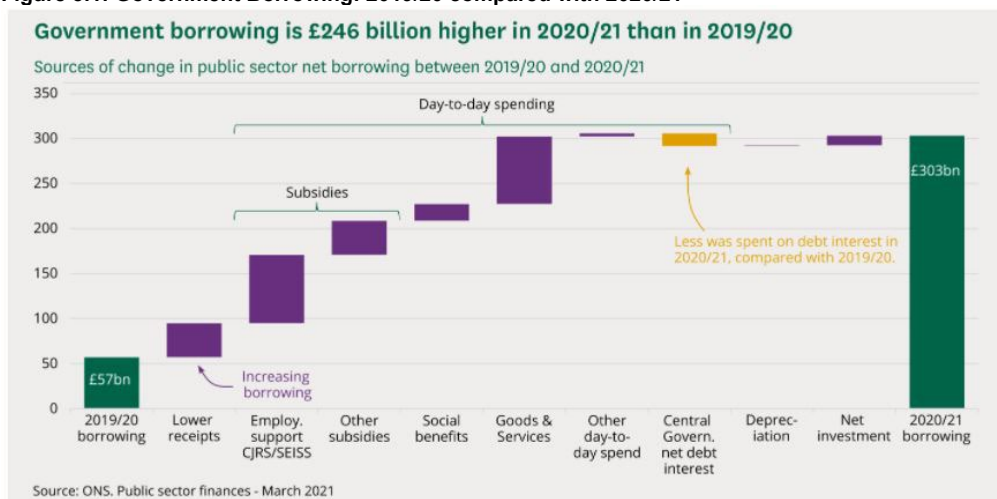
- 3.1 This section summarises some of the key economic, consumer and property market trends that have driven the changes in the retail and leisure sectors over the last decade and how town centres can respond to these dynamic trends to remain competitive and enhance their overall vitality and viability in the future. In addition, this update has been undertaken in the aftermath the three national lockdowns and “*social distancing*” measures implemented by the Government since March 2020. The pandemic created one of the toughest trading environments for the retail and leisure sectors and this section also reports on its immediate effects.

UK Economic Outlook

- 3.2 In the 18-24 months prior to the COVID-19 pandemic the UK economy had been characterised by a low growth trajectory. The *Office for National Statistics* (ONS) identified that the UK’s GDP increased by +0.3% (quarter-on-quarter) in the third quarter (Q3) of 2019. This represented a +1% year-on-year increase since 2018 (Q3), which was the weakest growth recorded since 2010 (Q1).
- 3.3 The impact of the COVID-19 pandemic in 2020 saw the UK economy experience its biggest annual decline in Gross Domestic Product (GDP)¹³ (-9.9%) for over 300 years. Britain’s budget deficit (i.e. the gap between public spending and income from taxes) has also reached the highest levels experienced since the Second World War. Government borrowing climbed to a record £303 billion (or 14.5% of GDP) in 2020/21.

¹³ Gross domestic product or GDP is a measure of the size and health of a country’s economy over a period of time (usually one quarter or one year). It is also used to compare the size of different economies at a different point in time.

Figure 3.1: Government Borrowing: 2019/20 compared with 2020/21



Source: House of Commons Library: Government borrowing: Peacetime record confirmed (23/04/2021)
<https://commonslibrary.parliament.uk/government-borrowing-peacetime-record-confirmed/>

- 3.4 Experian Business Strategies (Experian) predict in their latest *Retail Planner Briefing Note 19* (January 2022) ('RPN 19') that “recovery over the coming years will be shaped by the after-shocks from the pandemic”. The unprecedented nature of the global pandemic means that all forecasts are subject to greater than usual uncertainty and volatility.
- 3.5 GDP in the UK expanded by 7.5% in 2021, making it the fastest growing economy in the G7 group of economies. However, the UK was recovering from a lower base, having seen the largest decline in 2020, at 9.4%. However, the scale of the rebound is uncertain given inflationary pressures; households are faced with rapidly rising inflation, an increase in the rate of national insurance contributions, energy price cap increases, higher interest rates and the war in Ukraine. HM Treasury¹⁴ estimates inflation¹⁵ to rise more intensely than previously anticipated, to a peak of 10.3% in 2022. The implications are that this will result in a drop in real disposable incomes in 2022 and beyond. Against this backdrop the forecast growth in GDP is projected to moderate to an average of 3.9% in 2022 with a projected decline by 2023 of -0.3%.

Retail Spending

- 3.6 The COVID-19 pandemic has inevitably had a dramatic impact on consumer spending and retail sales in 2020. Although consumer spending has been a key driver of economic growth since the BREXIT referendum in June 2016, there had been increasing signs pre-COVID-19 that growth was starting to “soften”. Figures show that household spending

¹⁴ HM Treasury Forecasts for the UK economy: a comparison of independent forecasts No. 423 (October 2022)

¹⁵ Based on Consumer Price Inflation or CPI.

slowed to an eight year low (+1.2%) in 2019 due principally to the impact of BREXIT on consumer confidence.

3.7 The latest Experian¹⁶ forecasts for **retail spend per head** show:

- **Convenience goods:** The impact of COVID-19 resulted in a significant +8.7% surge in spend per head in 2020 but a contraction of -3.7% in 2021. This followed negative growth in 2019 (-1.2%) and with overall growth of -0.6% between 1997 and 2020. As we describe below, the negative growth in convenience goods spending over the last 15 years has had a significant impact on the grocery sector and on retailer business models. Experian predict that the short term outlook for convenience goods reflects the persistence of post-pandemic food spending trends resulting from increased work from home. However these are expected to “unwind” over the medium/long term. Experian forecast a fall in convenience spend in 2022 (-2.0%), and annual (per capita) growth over the medium to long term “*flatlining*” at around +0.1% up to 2040.
- For **comparison goods** the figure shows year-on-year growth rates recovering from a low of -1.0% in 2009, to a high of +6.0% in 2015. Following modest growth of +1.6% in 2020, Experian predict that (per capita) growth will settle at around +2.9% per annum on average up to 2040. This growth forecast is significantly below the historic long term trend (1997-2020) of +5.1% per annum.

3.8 These expenditure growth trends and forecasts have informed the updated assessments of retail capacity. Clearly any further dampening of growth rates over the short to medium term due to rising inflation and the cost of living crisis will have implications for the viability of existing retail businesses and the demand for new space.

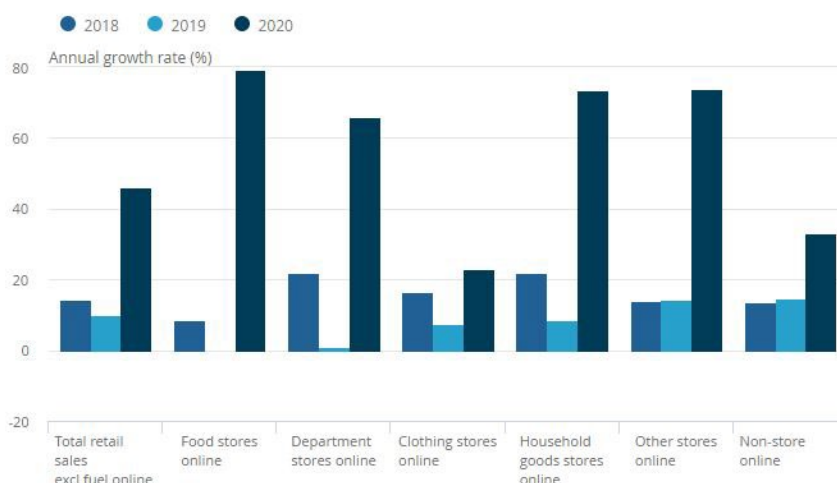
The Rise of Online Shopping

3.9 The growth in non-store retail sales has undoubtedly had the most significant impact on consumer spend and behaviour over the last decade, and on our High Streets and traditional shops¹⁷. ONS figures show that in 2020, the amount spent in online retail sales increased by 46.1% when compared with 2019 as a whole, the largest annual increase since 2008. Food stores reported the largest increase for total online sales in 2020 of 79.3%

¹⁶ Source: Experian Retail Planner Briefing Note 19 (January 2022) Figures 1a and 1b.

¹⁷ Non-store retailing is commonly referred to as **Special Forms of Trading** (SFT). This comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

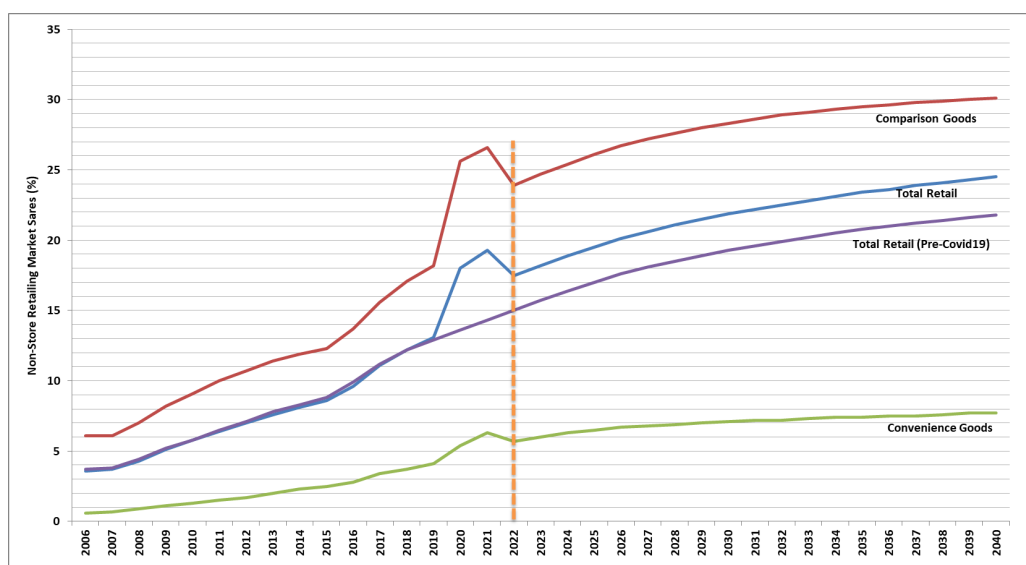
Figure 3.2: Annual Increase in Total Online Retail Sales for 2020



Source: ONS: Retail sales, Great Britain: December 2020 (22/01/2021)
<https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/december2020#annual-increase-in-total-online-retail-sales-for-2020>

- 3.10 As the figure below shows, SFT's overall market share (as a proportion of total UK retail sales) increased from 5.4% in 2006 to 28.1% in 2020. In other words, online accounted for almost one in every three pounds spent on retail goods in 2020. Of this total non-store retail sales, Experian estimate that comparison and convenience goods retailing achieved market shares of 34.1% and 18.0% respectively in 2020.
- 3.11 The impact of COVID-19 has been to increase the market share of non-store retail sales following the series of lockdowns. Experian's latest figures forecast that the total non-store market share to marginally decrease to 27.4% in 2022; and the share of comparison and convenience goods retailing to 31.9% and 19.1% respectively.
- 3.12 The latest Experian forecasts indicate that total SFT market shares will increase to 36.5% by 2040. Comparison and convenience goods non-store retail sales are forecast to reach 40.2% and 25.7% respectively by 2040.

Figure 3.3: Estimated and Projected Market Shares of Non-Store Retail Sales (SFT), 2006-2040



Source: Experian Retail Planner Briefing Note 19 (January 2022) Appendix 3 and Experian Retail Planner Briefing Note 17 (February 2022); Appendix 3

- 3.13 Experian predict that the pace of e-commerce growth will moderate over the long term as internet use is now almost at capacity. ONS statistics show that some 92% of all UK adults have internet access and almost all of those aged between 16-44 years in 2020¹⁸. Hence, Experian expect that the growth of the internet user base will be less of a driver than it has been in the past decade. Instead, generational differences in internet use will increasingly drive growth. For example, the ‘Millennials’ (defined as anyone born between 1981 and 1996) and ‘Generation Z’ (anyone born between 1997 and 2010) generations have grown up in digital environments and use technology more intensively. These groups will account for half of the adult population by the end of the 2020s (compared to 39% in 2019) and the bulk of retail and leisure spending. Their preference for online shopping could well represent the “*tipping point*” for the retail industry as a whole, and this will have been further accelerated by the impact of the pandemic.
- 3.14 Other research¹⁹, published before the impact of the pandemic, predicted that the growth in online sales could be even faster than forecast by Experian; accounting for a substantial 53% of total retail sales by 2028. This faster growth it is argued will be driven by the significant improvements in the convenience and choice of online purchasing through further advances in smartphones, mobile/wearable technology and Artificial Intelligence (AI), alongside improved web-based platforms and social media. The expansion of 5G and

¹⁸ Source: ONS: Internet users, UK: 2020 (Release date 06/04/2021) <https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/bulletins/internetusers/2020>

¹⁹ ‘The Digital Tipping Point – 2019 Retail Report’ (Retail Economics and Womble Bond Dickinson)

fibre networks, cheaper and faster deliveries (including the potential for drone deliveries, autonomous delivery vehicles, etc.), more 'click-and-collect' options and easier return processes will also provide the platform for increasing online purchases.

- 3.15 Whatever the forecast growth in online sales and market shares, it is clear that high streets, town centres and physical retailers will need to work even harder to retain their existing customer base and attract new customers over the short (post-pandemic), medium and long term.
- 3.16 In terms of forecasting the potential capacity for new physical retail floorspace, Experian estimate that approximately 25% of all SFT sales for comparison goods and 70% for convenience goods are still sourced through traditional ('*bricks-and-mortar*') retail space, rather than through '*virtual*' stores and/or '*dot com*' distribution warehouses. On this basis, Experian adjust their SFT market shares downwards for total retail to 17.5% in 2022, 19.5% by 2025, 21.9% by 2030 and 24.5% by 2040²⁰. These market shares are higher than Experian's pre-COVID-19 forecasts²¹ of 15% in 2022, increasing to 21.8% by 2040. In line with standard approaches these adjusted/recalibrated market share figures are preferred for retail capacity assessments and used in this update.
- 3.17 It is clear that the "*digital revolution*" and growth of online retailing has, and will continue to have, a significant impact on Britain's retailers, sales and high streets. The early impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (examples being the rationalisation of HMV, Currys, GAME and other stores across the UK). However this does not mean that other comparison goods categories are immune to the impact of the internet. For example, there has been an increase in online fashion 'stores' and purchases over the last decade. The online fashion retailer Asos purchased the Arcadia brands (including Topshop, Topman and Miss Selfridge) in February 2021 for £330m after Arcadia collapsed into administration. Asos purchased the stock, which it would sell online, but has no interest in the store portfolio. As a continuation of this trend the online fashion retailer Boohoo bought Dorothy Perkins, Wallis and Burton in February 2021 completing the breakup of the Arcadia Group. The deal to buy the three remaining fashion brands out of administration did not include any of the 214 UK stores.
- 3.18 The "*digital revolution*" is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand through say

²⁰ Experian Retail Planner Briefing Note 19 (January 2022)

²¹ Experian Retail Planner Briefing Note 17 (February 2020)

Netflix or Amazon Prime, and through new recently launched channels by Apple and Disney. Social media, Skype, Zoom, etc. are also displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences has accelerated during the pandemic and is exacerbating a '*digital divide*' between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent businesses that serve the day-to-day needs of their local (high street) communities. Yet the success of businesses at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.

- 3.19 In summary, both retailers and high streets will need to compete for shoppers and expenditure through a variety of means including creating experiences that will attract the interest and attention of potential consumers across all age and socio-economic groupings.

Retailer Business Models and Requirements

- 3.20 The challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. This has created significant challenges for traditional "*bricks-and-mortar*" retailing and the high street. Consequently national multiple retailers are having to constantly review and rapidly adapt their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.
- 3.21 These dynamic trends are best illustrated by the changes in the grocery sector over the last decade. In the circa 25 years up to 2010 the sector enjoyed a period of strong growth, principally driven by new larger format store openings in predominantly edge and out of centre locations. Since 2010, the top-5 main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) have dramatically changed their business models; their focus has been on growing market share through online sales and new smaller convenience store formats (including Tesco Express, Sainsbury's Local and Little Waitrose). As a consequence, applications for large store formats have slowed to a virtual standstill over the last decade and extant permissions have not been implemented. Outside of the so-called top-5 grocers, the 'deep discount'²² food operators (namely Aldi and Lidl) have significantly increased their respective market shares through new store openings. Notwithstanding this the grocery and convenience sector has had buoyant sales during the pandemic, particularly in town, district and local centres as many households have been forced to work from home and only the foodstores and 'essential stores' have been open during the series of lockdowns, including local independents.

²² Also referred to as 'Limited Assortment Discounter' ('LADs') by the Competition Commission Report.

3.22 The non-food retail sector has also experienced a significant impact from the rise of online shopping over the last decade, which has impacted on business models and store viability. Many well-known retailers have either closed or have significantly reduced their store portfolios. The table below summarises some of the higher profile “*casualties*” since 2008.

Table 3.1: The Largest Retailers that have gone in Administration since 2008

Year	Retailer	Stores	Employees	Sector
2020	M&Co	262	2,700	Clothing
	DW Sports	75	1,700	sportswear
	Benson Beds	242	1,900	Furniture
	Harveys Furniture	20	240	Furniture
	TM Lewin	65	600	Clothing
	Le Pain Quotidien	10	200	food and beverage
	Monsoon Accessories	35	550	Fashion & accessories
	Oasis & Warehouse	92	2,300	Clothing
	Kath Kidston	60	900	Fashion & accessories
	Brighthouse	240	2,700	Household goods
	Laura Ashley	155	2,350	Clothing
	Oddbins	56	567	off licences
	Hawkins Bazaar	22	177	toys & games
Beales	22	n/a	Department Store	
2019	Select	180	2,000	clothing
	Debenhams	165	25,000	Department Store
	Clinton Cards	332	2,500	cards, gifts
	New Look	60	1,000	Clothing
	Mammas & Pappas	32	740	Babywear, etc.
	Mothercare	79	2,500	Babywear, etc.
	Bonmarche	318	2,887	Clothing
	Thomas Cook	560	9,000	Travel Agents
	LK Bennett	41	480	Clothing
Patisserie Valerie	71	900	food and beverage	
2018	HMV	133	2,200	music, DVD, games
	House of Fraser	59	17,500	department
	Poundworld	350	5,300	discount
	Wine Rack / Bargain Booze	760	4,000	off licences
	Maplin	200	2,500	IT
2017	Toys 'R' Us	105	3,200	toys & games
	Palmer & Harvey	-	4,000	wholesaler
2016	Store Twenty One	76	1,080	clothing/variety chain
	BHS	164	11,000	clothing/variety chain
2014	Brantano	200	2,000	footwear
	Phones4U	550	5,600	mobile phones
2013	HMV	238	4,350	music
	Blockbuster	528	4,190	DVD rental
2012	Comet	236	7,000	electricals
	Game	600	6,000	video games
	Peacocks	550	9,600	clothing
	JJB Sports	250	6,300	sportswear
	Alexon	990	2,700	clothing
2011	Focus DIY	170	3,919	DIY
2009	Wine Rack/ Threshers/ Bottoms Up/ Victoria Wine	1,300	6,500	off licences
	Zawi	150	3,500	music
2008	Ethel Austin	300	3,100	clothing
	Adams	271	3,200	children's clothing
	Woolworths	820	30,000	variety chain
	Stead & Simpson (Shoe Express/ Lilley & Skinner/ Peter Briggs)	375	3,000	footwear
	Faith Shoes	284	2,000	footwear
	Roseby's	280	2,000	furnishings
	Motor World	284	2,235	car accessories
	MFI	173	1,100	furniture
	Stylo Shoes	1,067	5,400	footwear
	Allied Carpets	273	2,300	floor coverings
Blacks Leisure	400	2,640	outdoorwear	
TOTAL:		15,330	233,305	

Source: Centre for Retail Research (2020)

Notes: These figures relate to retail corporations that went into legal administration in the year shown. The test for inclusion is (a) administration and (b) national significance. The table does not indicate or purport to show whether the company has disappeared, such as Woolworths, or still survives in a robust manner, such as HMV or Peacocks. Appearance in the table does not imply that the brand is no longer used or does not trade. Where a retailer has suffered several failures the date used is normally the one where most assets or staff were involved. Retailers that have shrunk their businesses without going through administration are not included.

3.23 Whilst 2019 was generally regarded as one of the hardest for the retail sector; with a net closure of some 7,550 retail units, this was surpassed in 2020 due to the impact of the

pandemic and represented probably the worst year for retailers for over 25 years. The *Centre for Retail Research* (CRR) has identified that over 16,000 shops closed in 2020 across the UK, impacting on over 180,000 jobs. In 2021, some 11,000 shops closed across the UK, resulting in almost 54,000 jobs.

- 3.24 The pandemic has accelerated the demise of a number of high profile retailers that were already struggling due to falling sales and increasing costs/debt, including Debenhams, Oasis, Warehouse, Laura Ashley, the Arcadia Group and Cath Kidston. John Lewis also announced the closure of four department stores and four 'At Home' stores. This illustrates that impacts are being experienced by all high streets and shopping locations, including centres within the DC area.
- 3.25 National retailers with extensive high street store portfolios are struggling to maintain market shares and remain profitable in the increasingly competitive environment. The higher costs of trading from high streets compared with online and out-of-centre retailing, also means that it is not a "*level playing field*". This is a further contributing factor to the significant number of store closures that have occurred over recent years.
- 3.26 In summary, although some retailers are better positioned to cope with the growth in online shopping and the shifts in consumer behaviour and preferences, many are struggling to position themselves quickly enough to absorb rising costs and engineer the vital transition to a more technology-focussed business model. These trends and challenges will have been further exacerbated and accelerated by the impact of COVID-19.

Rising Occupancy Costs

- 3.27 'Bricks and mortar' retailers are having to absorb higher than inflation increases in year-on-year occupancy costs (for example, rents, business rates, service charges, utility bills, staff costs, etc). This outpaces sales growth for many retailers, eroding profitability and resulting in more store closures.
- 3.28 As described above it is not a "*level playing field*" between high street and online retailing, or between high street and out-of-centre retailing. In response to the budgetary challenges from rising costs and tight margins, retailers will need to drive up efficiencies and productivity from existing floorspace to remain viable.
- 3.29 It is standard practice for retail planning assessments to make a reasonable and robust allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace for it to remain vital and viable. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. The latest *Retail Planner Briefing Note* (RPBN 19) (January 2022) provides forecasts of annual floorspace productivity growth rates based on two different scenarios: (i) the '**constant floorspace scenario**', based on limited potential for new retail

development, resulting in greater efficiency of existing floorspace; and (ii) the ‘**changing floorspace scenario**’, which takes account of the impact of new retail development on average retailer sales performance. The table below sets out the differences between the two scenarios.

Table 3.2: Floorspace Productivity Growth Rates (year-on-year growth %)

	2020	2021	2022	2023	2024-2028	2029-2040
CONSTANT FLOORSPACE:						
Convenience Goods	6.6%	-9.4%	-0.9%	0.2%	0.3%	0.3%
Comparison Goods	-7.2%	-0.2%	6.4%	2.2%	2.4%	2.9%
CHANGING FLOORSPACE:						
Convenience Goods	6.6%	-9.4%	2.7%	1.6%	0.1%	0.0%
Comparison Goods	-7.2%	-0.2%	7.2%	2.3%	2.2%	2.6%

Source: Experian Retail Planner Briefing Note 19 (January 2022); Figures 3a/3b and 4a/4b.

- 3.30 As Experian explain the volatility in sales densities in 2020 and 2021 have been driven by sharp swings in retail spending due to temporary business closures during lockdown(s). There is an expectation that there will be a correction when shopping spending recovery becomes more established and there is near return to more normalised shopping patterns. The medium term forecast (2024-28) shows an upgrade for comparison goods over convenience goods. Notwithstanding this, Experian predict that budgetary challenges from rising costs and tight margins will remain key factors underpinning floorspace efficiencies over the coming years. Budgetary pressures mean that retailers will have to increase efficiencies from current floorspace including through redevelopment/repurposing of existing floorspace; adoption of new technology and innovations; more effective marketing strategies; and adopting an ‘omni-channel²³’ strategy that uses internet sales to increase the sales performance of physical shops. This is against a backdrop of weak demand for retail property, high vacancy levels and a significant fall in new retail-led development in centres across the UK.
- 3.31 For these reasons we prefer to test higher ‘constant floorspace productivity’ growth rates for retail planning assessments, as they better reflect national trends and the need for existing retailers to increase their sales potential and profit margins to remain viable.

Retail & Shopping Centre Investment

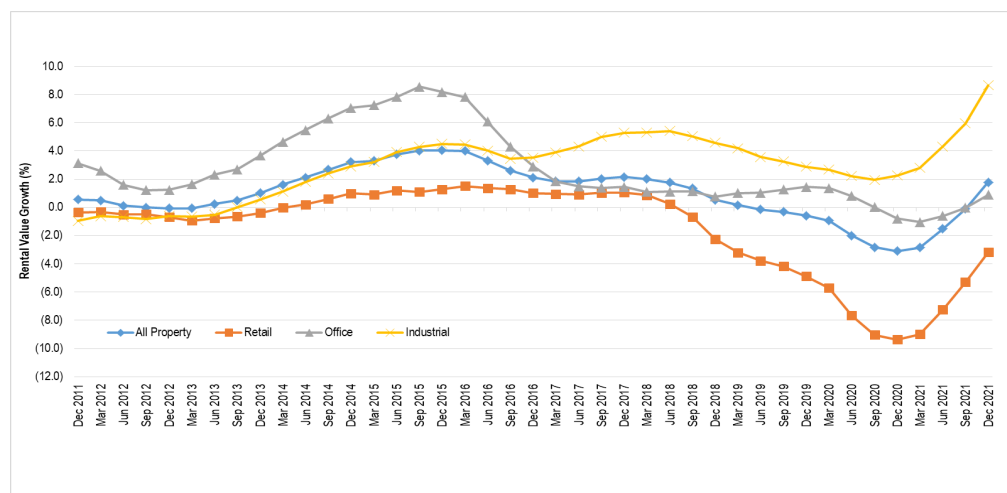
- 3.32 The rise in the number of retailer “casualties” and vacancy levels has created a challenging environment for existing retailers and investments in towns and shopping centres across

²³ ‘Omni-Channel retailing’ refers to the integration of different methods of shopping available to consumers (e.g. via the internet, in a physical shop, or by phone).

the UK. The current investment climate is becoming increasingly polarised. The top 50 shopping locations generally have the best prospects for attracting new investment and development. This is because they benefit from strong catchments and the necessary critical mass of shops, leisure facilities and other uses to remain commercially viable and attractive investment propositions.

- 3.33 Outside of the top 50 it is the more secondary towns and shopping locations that potentially remain vulnerable to further reductions in their existing retail and commercial offer. This is against the backdrop of limited and falling demand for new shops and commercial space.
- 3.34 Demand for retail space in centres across the UK has fallen dramatically since 2007 and is currently at an all-time low. In turn this fall in demand is impacting on property values and rents. For example, LSH research conducted before the pandemic showed that the retail sector recorded a 4.9% year-on-year fall in rents in December 2019 and fell further in December 2020 by 9.4% and by 3.2% in December 2021²⁴. As the figure below shows, retail has performed poorly compared with the other property sectors since 2011 with its origins back to the economic crisis in 2007/08. This trend has been further exacerbated by the pandemic.

Figure 3.4: Property: Average Rental Growth (%)



Source: MSCI UK Quarterly Property Index (February 2022)

- 3.35 In simple terms many centres and shopping locations across the UK simply have too much retail floorspace stock, or they have the “*wrong type*” of retail floorspace that does not meet the needs of modern national retailers for larger format shop units. Some analysts indicate that there was as much as 30% too much physical space in the retail sector pre pandemic. This over-supply of retail floorspace and limited market demand is placing further

²⁴ LSH Research (2022) using MSCI data

pressures on the viability of existing stores and shopping centres. In turn, this makes it difficult for landlords, investors and retailers to justify additional capital expenditure.

- 3.36 The shopping centre sector also has faced significant challenges over the past decade from the rise of online shopping, falling market demand and increasing retailer failures. In recent years, the response to diminishing demand from traditional retailers has been to turn to the casual dining and commercial leisure (for example, cinemas) to take up surplus space. However, this is now becoming increasingly difficult due to the pressure on disposable income and a fall in demand from food and beverage operators in an increasingly “saturated” market - a trend that has been further accelerated by the pandemic. As a result, shopping centre owners and landlords are struggling to retain existing tenants, let alone attract new retailers into vacant shops.
- 3.37 Against this backdrop, occupiers are negotiating shorter lease terms and greater incentives from landlords to continue trading in the face of increasing online competition and economic uncertainty. This will further force down rents and profits across more marginal, secondary shopping locations. All these factors are resulting in a significant structural shift in retail property and shopping centres, and the way in which this type of floorspace will be utilised in the future.

Out-of-Centre Retailing

- 3.38 The development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres. As described above, the main grocery retailers have pulled back from new larger format superstore openings in edge and out of centre locations to focus on maintaining and increasing market shares through online sales and opening smaller convenience outlets. The exception to this is the deep discounters, Aldi and Lidl, who continue to seek new sites in mainly edge and out-of-centre locations.
- 3.39 Vacancy levels in out-of-centre retail warehouses and parks have also increased over the last decade following the closure of major operators (such as, for example, Toys R Us, Poundworld, Office Outlet, etc.), and a reduction in the store portfolios of other major out-of-centre retailers (such as, for example, B&Q and Homebase). There are likely to be further increases in closures, particularly in the poorly performing “*first generation*” and secondary shopping locations, as leases come up for renewal and more retailers go into administration. As a result, a number of out-of-centre foodstore and retail warehouse sites are being repurposed and/or redeveloped for alternative uses, including logistics and residential uses.
- 3.40 Notwithstanding this, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of

larger format modern outlets, their lower occupancy costs, extensive free parking and convenient access to the road network. This is still an attractive proposition for those retailers that are still seeking space in the current market. For example, as part of its revised business model Marks & Spencer has closed a number of its traditional high street stores and “replaced” these with ‘Simply Food/Food Hall’ branded stores in out-of-centre locations (for example in Dover, Maidstone, Great Yarmouth, Harlow, Wakefield and Rugby). As a result, retailers who previously anchored the vitality and viability of town centres, are now competing directly with high streets for shoppers, spend and sales.

Vacancy Rates

- 3.41 According to Local Data Company (LDC), the UK lost 11,000 shops in 2020, with a further 18,000 estimated to close in 2021. At the end of 2020, the GB average ‘All Vacancy Rate’ (retail and leisure combined) according to LDC stood at 13.7%. The sharpest increase in vacancy rates was seen in Shopping Centres category, rising from 14.4% at the end of 2019 to 17.1% at the end of 2020.
- 3.42 With the national lockdowns and consumers being confined to work in their local areas, centres with an immediate residential catchment have benefited. This has resulted in cities and larger centres that are dependent on commuting populations to suffer more adversely than smaller centres. LDC state that the City Centre vacancy rates increased by 2.5% to 16.1% in 2020. By way of comparison, commuter towns increased by 1.1% to 10.9% and villages by 0.4% to 11.1%. The vacancy rates for the South East area overall increased from 10.4% in 2019 to 12.1% in 2020.
- 3.43 It is anticipated that 2022 will see some return to normality following the vaccine rollout and loosening of restrictions. Nevertheless there is likely to be a continuing level of consolidation amongst operators. LDC estimate retail vacancy rate reaching 14.6%; leisure 11.4%; with the combined rate rising to 15.7% at the end of 2021.

Use Classes Order & Permitted Development Rights

- 3.44 Since the previous retail studies undertaken by the respective Councils, the Government issued a series of reforms to the planning system. Effectively, changes to the use classes were brought in to provide a more flexible approach to controlling commercial land uses. This saw the replacement of Use Class A1 to A5, D1 and D2 replaced with E Classes (Commercial), F1 (Learning and Non-Residential) and F2 (Local Community Uses) and the restructuring of sui-generis uses (public houses, hot food takeaways, cinemas, music venues, bingo etc.).

- 3.45 The result of these changes is that what would previously be a change of use under the subsumed use classes is no longer considered development under the Planning Acts, and accordingly is no longer subject to planning control. In launching the reforms the Government announced that the regulations will give “...*greater freedom for buildings and land in our town centres to change use without planning permission and create new homes from the regeneration of vacant and redundant buildings*”²⁵.
- 3.46 The impact of the changes will still require the definition of a town centre boundary and a primary shopping area, or a primary ‘commercial’ area to be the foci for E and F Classes. Also, in most instances the former use classes can be ‘translated’ into the equivalent categories within the new E and F Classes. This can assist with the interpretation of policy wording and the effective use of conditions. It is worth noting that under the previous use-class system such categories as convenience, comparison (and bulky) goods fell within the A1 use-class and there is a long established planning pedigree of reflecting these A1 retail categories effectively in planning conditions.
- 3.47 The changes will have implications for primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas, as a change of use between Class E does not constitute development and will therefore not require planning permission. It should be noted that the effectiveness of frontage policies was declining before the pandemic and previous changes to the UCO. However, there may still be a role to control some sui-generis uses in key town centre locations, such as provision of fast food takeaways, betting shops, payday loan shops or other uses that are justified to be subject to planning control.
- 3.48 Hence beyond 2022, town centres are likely to consolidate their retail and shopping role with more emphasis on place and non-transaction uses, this could include high activity based land uses such as health, education being located in more central locations and stem previous trends of decentralisation.
- 3.49 The increase in city living and residential development in town centres is likely to be a growth area in the next 10 years and could be a positive regenerative mandate. We also expect more emphasis on residential upper floor living accompanying ground floor commercial uses.
- 3.50 The introduction of Class AA and AB in August 2020²⁶ (under the Permitted Development Changes (Amendment No. 2) (2020)), allowing new residential on detached or terrace buildings in commercial or mixed use areas (but not in conservation areas) could potentially lead to the loss of commercial floorspace to residential.

²⁵ <https://www.gov.uk/government/news/pm-build-build-build>

²⁶ The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020.

- 3.51 Furthermore, the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021 (Order) that came into force on 21 April 2021 creates a new class of permitted development right (Class MA) into the Town and Country Planning (General Permitted Development) Order 2015 (GPDO) authorising changes of use from Use Class E commercial uses to Use Class (C3) residential. The changes within the Order authorise a change in the permitted use of a property or land from a use falling with Use Class E to Use Class C3 residential use where the property has:
- been in Class E use for 2 years (including time in former uses i.e. A1, A2, A3, B1, D1 or D2 now within that Class); and
 - has been vacant for at least 3 continuous months.
- 3.52 These changes will replace existing retail, light industrial and office to residential rights with rights applying to all of the relatively recent Use Class E in which those uses now sit. Exercise of the right is subject to prior approval by the local planning authority and therefore would be subject to some planning control. Details must be submitted relating to flooding, transport, contamination, noise amenity, natural light, fire safety and agent of change issues. The area that can be converted is capped, with a maximum size limit of 1,500 sqm of floorspace capable of conversion using the right.
- 3.53 The implications arising from these changes result in more flexibility and are likely to be focussed in the peripheral parts of existing town centres, reflecting the influence of land values, but the outcomes are unclear, particularly the likely scale of increased residential and loss of commercial space and this should be monitored further. In addition, these use-class and permitted development rights changes have added complexity to the types of uses that are supported in centres – particularly how the new use classes link with the current NPPF definitions of ‘main town centre uses’ and it would be important for the emerging version of the Local Plan to set out a clear policy approach to uses in centres.

Dorset in Context

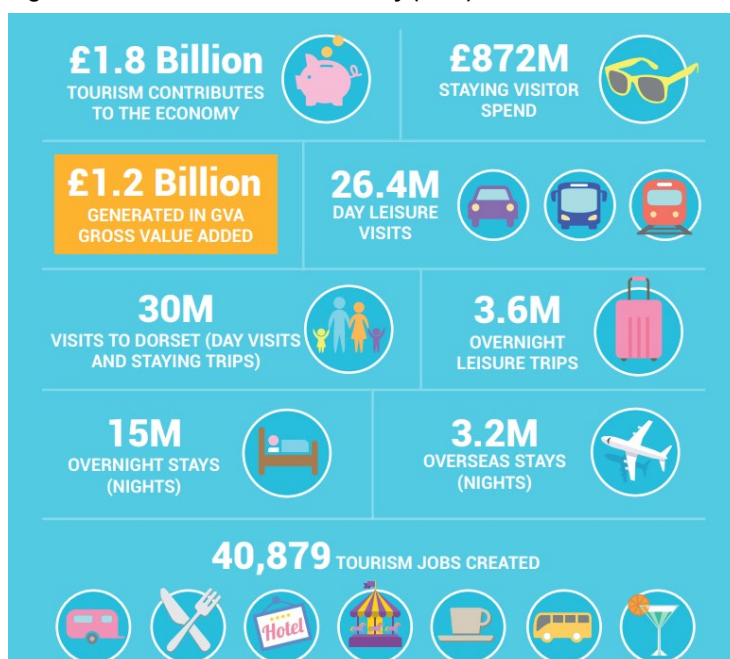
- 3.54 Under **Policy DEV 1** of the Local Plan Consultation (2021), the housing requirement and the need for employment land in Dorset over the period 2021 to 2038 is defined as follows:
- a deliverable supply of housing land to accommodate a minimum of 30,481 dwellings, which will be delivered at a minimum average annual rate of 1,793 dwellings per annum; and
 - a minimum of 131 hectares of employment land.
- 3.55 Delivering sustainable economic growth is stated to be fundamental to the future prosperity of Dorset and forms one of the strategic priorities of the emerging local plan as shown below:

Figure 3.5: Strategic Economic Priority

Strategic Priority	The role of the Local Plan	Relevant Strategic Policies in this Section
Economic Growth We will deliver sustainable economic growth and improved infrastructure across the whole of Dorset, increasing productivity and the number of high quality jobs, creating great places to live, work and visit.	The Local Plan can help to deliver economic growth by enabling sustainable economic development in the right locations and providing homes for those who work in the area. Infrastructure provision to meet the area's needs is important to facilitating this growth. Around 21,000 new jobs are to be created across the area over the lifetime of this plan.	Employment sites <ul style="list-style-type: none"> - ECON1: Protection of key employment sites
		Retail / town centres <ul style="list-style-type: none"> - ECON3: Hierarchy of centres and the sequential test - ECON4: Town centre impact assessments
		Tourism <ul style="list-style-type: none"> - ECON6: Supporting Vibrant and Attractive Tourism - ECON8: Caravan and Camping Sites
		The Rural Economy <ul style="list-style-type: none"> - ECON10: Diversification of land based rural businesses

3.56 It is recognised that aside from the tourism industry, the key economic sectors in Dorset are advanced engineering and manufacturing, including aerospace, defence, composite and marine technologies; agri-tech; and food and drink, with the area boasting a varied selection of locally produced victuals, including meat, fish, dairy and wine.

Figure 3.6: Dorset's Tourism Economy (2019)



Source: [Visit Dorset](#) (2019)

3.57 Workforce retention is however a big issue for the council area with many school leavers moving away to pursue careers elsewhere or to go to university due to the lack of local higher and further education facilities. Also many people move into the area to retire.

These trends are expected to continue, exacerbating current issues which businesses face in recruiting and retaining suitable employees²⁷. Additional economic issues include²⁸:

- Dorset is less competitive than the national average. In recent years competitiveness has worsened, with all parts of Dorset becoming less competitive. Only the former district areas of East Dorset and West Dorset rank at or above the median for the country. The former area of Weymouth & Portland ranks 372 out of 379 localities and Purbeck is among the ten areas reporting the greatest fall in competitiveness ranking;
- Above average representation of advanced engineering and of manufacturing as a whole, but low representation of businesses in high productivity sectors and also below average representation in high R&D spending sectors;
- Employment is expected to grow by more than 11,000 in Dorset over 2019-2029 – but most of this new employment will be part-time;
- 45% of skills required by employers over the next decade are for NVQ level 4 and above;
- 14 neighbourhoods in Dorset are in the most deprived 20% nationally for employment and 10 of these are in the former borough of Weymouth & Portland; and
- 36% of the Dorset workforce is aged over 50 compared with 28% in England;

3.58 In response the Council has managed investments in digital and physical connectivity through projects like Superfast Dorset. This project involves the council working with contractors to upgrade the communications infrastructure across the area that will enable most people and businesses to get superfast broadband speeds (at 24Mbps+).

3.59 Furthermore, investment by the Council and Dorset Local Enterprise Partnership in the Dorset Innovation Park (Enterprise Zone) near Wool has secured high quality jobs in engineering and manufacturing, and with the construction of twenty new workshop units. Investment has also been secured to construct a Defence Innovation Centre with the objective of developing an advanced engineering cluster of excellence, building on the area's strengths in marine, defence and energy.

²⁷ Dorset Council Local Plan Consultation (January 2021)

²⁸ State of the Dorset Economy (December 2020)

Summary

- 3.60 Our towns, traditional high streets and shopping centres have been challenged for more than a decade by falling market demand, rising occupancy costs and increasing competition from online and out-of-centre shopping. These trends have been further accelerated and compounded by the COVID-19 pandemic; and are resulting in an increase in vacant shop units, often in primary shopping areas, as retailers and occupiers either choose to downsize and/or close stores in some locations (e.g. Marks & Spencer, John Lewis), or they are forced out of business altogether due to failing business models and unmanageable debts (e.g. the Arcadia Group).
- 3.61 Today, many of our traditional towns and shopping centres simply have too much retail space. The critical challenge over the short, medium and long term will be how to retain existing businesses, fill/replace the voids and attract new investment. The danger is that an increase in long-term vacancies in centres will lead to a 'spiral of decline', which will further engender feelings of neglect and lack of investment confidence in town centres, and "push" more people to shop online.
- 3.62 As set out above, residential provision in centres is already being encouraged, including by previous national planning changes (such as office to residential conversions through prior approval, and permitted development for two flats above a shop), and through emerging local development plan policy. In those cases where retail vacancies are long-term and more often than not concentrated in secondary shopping streets/pitches, it will be necessary to plan for alternative uses and/or consider options for redevelopment. As a result of the increasing drive towards more flexible planning through changes to the Use Classes Order and Permitted Development Rights, there will inevitably be more mixed-uses within centres particularly residential, and, this should be encouraged and planned for through enabling planning policies.
- 3.63 It will be important to maximise residential provision in the most sustainable locations, particularly in centres, as part of a balanced mix of uses. Therefore, consideration needs to be given to planning policies and allocations enabling the growth of other uses, such as education, leisure and recreation, within centres, which, along with residential, are particularly positive in terms of enhancing the vitality of centres.

4. Quantitative Retail Needs Assessment: Assumptions

4.1 This section provides an update on the key assumptions and forecasts underpinning the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the DC area up to 2040. The assessment updates and supersedes previous retail capacity findings (as applicable to the Dorset Council area) and as identified in the following studies:

- Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council ('Western Dorset Study');
- Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils and Update Addendum Report (March 2019) ('Eastern Dorset Study'); and
- Poole and Purbeck Town Centres, Retail and Leisure Study (November 2014).

Assumptions & Forecasts

4.2 The 'baseline' capacity tabulations are set out in **Appendices 2 to 4** for convenience goods and **Appendices 5 to 7** for comparison goods. The baseline capacity forecasts are based on the UK 2021 Experian mid-year population growth estimates and the latest Office of National Statistics' (ONS) subnational population projections (released March 2020)²⁹ and this methodology reflects best practice when undertaking capacity modelling.

4.3 In addition we have also tested a further population scenario incorporating the Council's population projections based on housing growth proposed in the DC area.

4.4 The following describes the key steps and assumptions underpinning the retail capacity assessment.

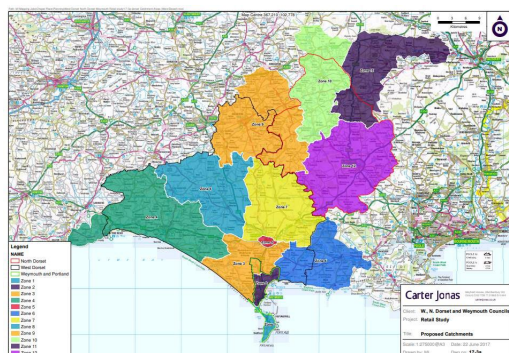
Study Area and Zones

4.5 The Study Area and composing zones have been informed by the aforementioned previous studies. The outputs from these have been combined to form a new study area as, in isolation; neither covered the entirety of the Dorset Council area. These are illustrated below.

²⁹ Experian: Retail Planner UK 2021 Release Note

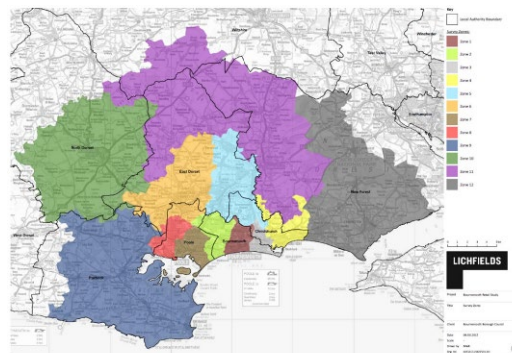
Figure 4.1: Previous Studies: Study Areas

Study Area: Western Dorset Study



Source: Joint Retail And Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council

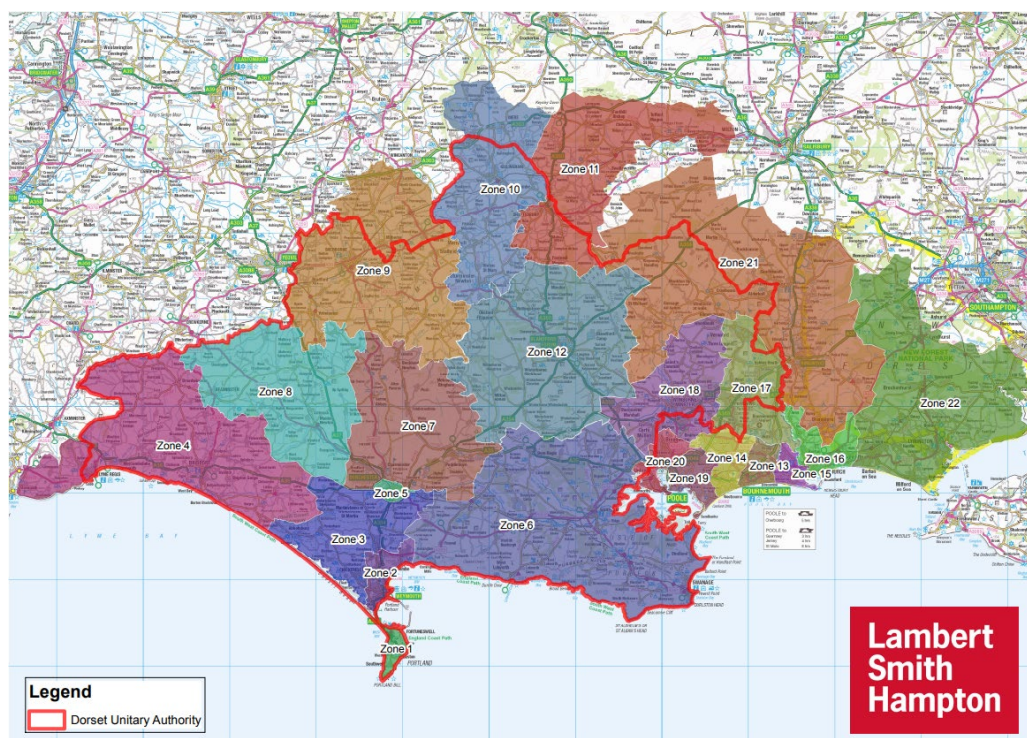
Study Area: Eastern Dorset Study



Source: Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils

- 4.6 We have drawn on these studies as they were underpinned by Household Telephone Interview Survey(s) (HTIS) that informed their respective market share assessments and which also inform the current update (see below).
- 4.7 As previously detailed, in isolation neither study fully covered the new Dorset Council area. As shown above, both studies comprised of 12 zones each with the geography of the Western Dorset Study extending considerably to the east. In comparison the Eastern Dorset Study had lower coverage on its western boundary with a wider coverage to the east around Bournemouth, Poole, Christchurch and the New Forest.
- 4.8 In deriving the Study Area for this update, the entirety of the Western Dorset study area has been retained. Additionally, from the Eastern Dorset Study the North Dorset Zone (Zone 10) has replaced Zone 12 of the Western Dorset Study; and Zone 6 from the Western Dorset Study and the Purbeck Zone (Zone 9) for the Eastern Dorset Study have been combined into a single zone.
- 4.9 The new study area is illustrated below (and at **Appendix 1**) and is composed of 22 zones:

Figure 4.2: Study Area: Dorset Retail & Leisure Study (2022 Update)



4.10 In terms of broad composition, Zones 1-12, 17 and 18 are representative of the DC area as follows:

- Zones 1-2 are broadly representative of the centres of Weymouth, Easton, Fortuneswell in the broader Weymouth and Portland area ;
- Zones 3-5 and 7-9 broadly represent centres such as Dorchester, Bridport, Lyme Regis, Sherborne, Beaminster in the Western Dorset area;
- Zones 6 represents the centres of Swanage, Wareham, Wool in the broader Purbeck area;
- Zones 10-12 represent centres such as Blandford Forum, Gillingham, Shaftesbury, Sturminster Newton, Stalbridge in the Northern Dorset area;
- Zones 17-18 represent Ferndown, Verwood, Wimborne, West Moors, Corfe Mullen, West Parley in the Eastern Dorset area; and
- Zones 13-16 and 19-20, and a large portion of 21 and the entirety of 22 are outside the Dorset Council area.

Market Shares

4.11 As detailed above, the capacity assessment is underpinned by market shares for stores and centres across the catchment areas which were identified by the Household Telephone Interview Survey(s) (HTIS) in the previous studies. As this assessment

represents a partial update, the Council has not sought to update this element of the research. However, we recommend that this will need to be updated to reflect prevailing shopping patterns and provision in the post-pandemic period.

- 4.12 In deriving the market shares, particular attention has been paid to the turnover of centres (excluding SFT) from the previous studies and specifically their total turnover by goods type (excluding SFT).
- 4.13 The market share assessment for both convenience and comparison goods is detailed at **Appendix 3** and **Appendix 6** respectively. These refer to the total market shares by location and for each goods (convenience / comparison) category.

Convenience Goods – Market Share Analysis

- 4.14 Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).
- 4.15 In summary the revised convenience goods market share analysis shows the following:
- the overall level of **retention** from across the **Study Area** (Zones 1-22) is 37.6% - this is a low level of retention. In terms of competing locations, the analysis shows there is leakage within the overall study area (Zones 1-22) to centres outside of the Dorset Council area notably to Poole (20.5%), Bournemouth (18.6%) and Christchurch (7%).
 - the overall level of retention increases to 79.3% when considering the representative DC Area (Zones 1-12; 17, 18) and representing a very good level of retention.
 - the highest level of retention (above 90% and from across the Study area i.e. Zones 1-22) is in Zone 1 (98.5%), Zone 2 (99.9%), Zone 3 (99.4%), Zone 5 (98.9%), Zone 7 (100%), Zone 10 (90.9%), Zone 12 (90.7%);
 - Easton, Portland has the highest retention level of 56.4% in its core³⁰ Zone 1;
 - Dorchester has its highest level of retention (30.6%) in its core Zone 5;
 - Locations in Purbeck have the highest retention (37.1%) in their core Zone 6;
 - Blandford Forum has its highest level of retention (30%) in its core Zone 12;
 - Gillingham has its highest level of retention (55.2%) in its core Zone 10;
 - Ferndown and Verwood have the highest level of retention in their core Zones 17 and 18 (42.1% and 30.9% respectively);
 - Wimborne has its highest level of retention (36.4%) in its core Zone 18; and

³⁰ 'Core' referring to the principal zone in which the centre is located.

-
- In terms of competing locations, Bournemouth has its highest level of retention (92%) in its core Zone 13; Christchurch (88%) in Zone 16 and Poole (91.7%) in its core Zone 19.

Comparison Goods – Market Share Analysis

4.16 Comparison goods³¹ are generally classified as items purchased less frequently and include clothing, footwear, household and recreational goods.

4.17 In summary the revised comparison goods market share analysis shows the following:

- the overall level of **retention** from across the **Study Area** (Zones 1-22) is 23.3% - this is a low level of retention especially when compared with the higher convenience goods retention rate of 37.6%. A large proportion of the leakage from the study area (Zones 1-22) goes to competing locations outside the Dorset Council area including Bournemouth (27.2%); Poole (24.3%), and Christchurch (5.5%).
- the overall level of retention increases to 48.2% when considering the representative DC Area (Zones 1-12; 17, 18) and representing a good level of retention.
- the highest level of retention (above 80% and from across the Study area i.e. Zones 1-22) is in Zone 1 (87.6%), Zone 2 (89.8%), Zone 3 (84.5%) and Zone 7 (81.5%);
- Weymouth has the highest retention level in Zone 1 (63.6%) as well as its core Zone 2 (62.4%) extending to Zone 3 (41.7%);
- Easton, Portland has the highest retention level of 14.4% in its core Zone 1;
- Bridport has the highest retention level (39.4%) in its core Zone 4;
- Dorchester has the highest level of retention (68.4%) in its core Zone 5;
- Locations in Purbeck have the highest retention have the highest retention (11.1%) in their core Zone 6;
- Blandford Forum has the highest level of retention (44.7%) in its core Zone 12;
- Gillingham has the highest level of retention (16.4%) in its core Zone 10;
- Ferndown has the highest level of retention in its core Zone 17 (14.4%);
- Wimborne has the highest level of retention in its core Zone 18 (20.8%);
- In terms of competing locations, Bournemouth has its highest level of retention (79.2%) in its core Zone 13; Christchurch (48.9%) in Zone 16 and Poole (74.6%) in Zone 20.

Population Projections

4.18 Under the **baseline** scenario, Table 1, (**Appendix 2** for convenience goods and **Appendix 5** comparison goods) sets out the latest base year (2022) population and projections (to

³¹ Please note that comparison goods and non-food shopping have the same meanings

2025, 2030, 2035 and 2040) sourced from the Experian MMG3 Geographic Information System (MMG3 GIS) for the Study Area. This includes the latest UK 2021 Experian mid-year estimates and more recent mid-year ONS inputs have been used.

- 4.19 Experian's population projections show the Study Area population (Zones 1-22) is forecast to increase by +3.5% (+32,187 people) between 2022 and 2040. In comparison the representative DC Area (Zones 1-12; 17, 18) the population is to increase by +5.3% (+21,310 people).
- 4.20 In addition we have also tested a further scenario incorporating the Council's population projections based on proposed housing growth. These have been incorporated to provide a composite base year population estimate and projections. This forecast is however dependent on the housing being delivered and therefore seen as an additional **composite scenario** to the baseline scenario.
- 4.21 Under this **composite scenario** the projections show the Study Area population (Zones 1-22) is forecast to increase by +5.1% (+46,892 people) between 2022 and 2040. In comparison the representative DC Area (Zones 1-12; 17, 18) the population is to increase by +8.9% (+35,887 people) (Table 1, **Appendix 8** for convenience goods and **Appendix 11** for comparison goods). This clearly shows a higher forecast rate of population growth than the baseline assessment but predicated on the housing being delivered and resultant growth taking place.

Expenditure per Capita & Special Forms of Trading (SFT)

- 4.22 Table 3 of **Appendices 2 and 5** forecasts the growth in total available convenience goods and comparison goods retail expenditure respectively across the Study Area and zones between 2022 and 2040 (excluding SFT)³².
- 4.23 The base year average expenditure figures (derived from our Experian MMG3 GIS) are based on 2020 prices; previous studies³³ were based on 2015 or 2012 prices.
- 4.24 In identifying expenditure per capita, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. An allowance for SFT at the base year to take account of goods sourced from

³² Total expenditure is derived by multiplying the population and average expenditure per capita levels together.

³³ Both the Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council; and the Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils were based on 2015 prices. The Poole and Purbeck Town Centres, Retail and Leisure Study (November 2014) was based on 2012 prices.

traditional ('physical') retail space has been based on Experian's latest Retail Planner Briefing Note 19 (January 2022).

Average Expenditure Growth Forecasts

4.25 The growth in average expenditure per capita levels over period to 2040 has been informed by the forecasts set out in Experian's latest Retail Planner Briefing Note (as described in **Section 2**). Experian's forecasts show for:

- **convenience goods** – a fall in convenience spend in 2022 (-2%), and annual (per capita) growth over the medium to long term “flatlining” at around +0.1% up to 2040. By way of comparison, previous studies that informed the authorities composing the unitary area were reliant on Experian's Retail Planner Briefing Note 15 (December 2017) that forecast a negative growth over the period 2017 to 2019, with limited growth of +0.1% over the longer term.
- **comparison goods** – following growth of 2.1% in 2022, Experian predict that (per capita) growth will settle at around +2.9% per annum on average up to 2040. In contrast the previous studies showed a growth of +0.9% in 2018; +2.1% in 2019 and predicted growth of circa +3.2% over the longer term.

Total Available Expenditure

4.26 Total available retail expenditure over the period to 2040 under the baseline scenario shows:

- a +3.2% (+£74.5m) growth in total convenience goods expenditure by 2040 across the Study Area (Zones 1-22) (Table 3, **Appendix 2**).
- a +58.2% (+£1,806.3m) growth in total comparison goods expenditure by 2040 (Table 3, **Appendix 5**).

4.27 Under the composite scenario the total available retail expenditure over the period to 2040 shows:

- a +4.8% (+£112.3m) growth in total convenience goods expenditure by 2040 across the Study Area (Zones 1-22) (Table 3, **Appendix 8**).
- a +60.7% (+£1,884.4m) growth in total comparison goods expenditure by 2040 (Table 3, **Appendix 11**).

'Inflow' (Trade Draw) from Outside Study Area

4.28 We have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the Study Area drawing from previous studies.

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- 4.29 Although the assessment of inflow is not an “exact science” due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that for comparison goods retailing the larger centres in the DC area (e.g. Dorchester, Weymouth) draw a higher proportion of their shoppers and trade from outside the defined study area, than the smaller centres and parades that generally serve the needs of their more local resident catchment populations. Notwithstanding this, it is to be expected that there will be an inflow from tourists and visitors to the DC area.
- 4.30 Typically, the ‘inflow’ of convenience goods expenditure to the main centres and stores from outside the wider study area is more limited than for comparison goods, as households generally carry out their main food shop at their more local and convenient stores, and do not normally travel longer distances for food purchases. Notwithstanding this, a reasonable allowance should be made for inflow associated for commuters and visitors/tourists, particularly for those centres close to employment hubs and major transport nodes.

Total Forecast Turnover

- 4.31 Based on the (survey-derived) market analysis and the ‘inflow’ assumptions, **Table 2, Appendix 4** sets out the revised turnover estimates for convenience goods with estimates for comparison goods turnover presented in **Table 2, Appendix 7** for the baseline scenario. The total combined goods turnover under this baseline for both convenience and comparison is £1,677.5m of which 55% (£918.4m) to convenience goods and 45% (£759.1m) to comparison goods.

Planned Commitments & New Development

- 4.32 In terms of retail commitments, Table 3 in **Appendix 4** (convenience goods) and Table 3 **Appendix 7** (comparison goods) set out planned retail floorspace identified for both goods types. These have been informed by the Council and the major planned / committed retail schemes by type of goods are as follows:

Table 4.2: Dorset Council Area Commitments: Convenience Goods

	CENTRE	PLANNING REF	LOCATION
[1]	Bradford Abbas Parish (Out-of-Centre)	WD/D/16/000486	Land adj. Unit 4, Peel Centre, Babylon Hill, Yeovil
[2]	Shaftesbury (Out-of-Centre)	P/FUL/2020/00008	Former Cattle Market Christys Lane Shaftesbury Dorset SP7 8PH
[3]	West Parley (Out-of-Centre)	3/17/3609/OUT	Land East of New Road, West Parley, Dorset
[4]	Wimborne Minster (Out-of-Centre)	3/14/0016/OUT	East and West of Cranborne Road, Burts Hill, Wimborne.
[5]	Littlemoor (Out-of-Centre)	WP/16/00253/OUT	Lands to north of Littlemoor Road, Weymouth
[6]	Gillingham (Out-of-Centre)	2/2018/0036/OUT	West Of Shaftesbury Road At Land South Of Gillingham Shaftesbury Road Gillingham Dorset
[7]	Bridport (Out-of-Centre)	WD/D/17/000986	Land at Vearse Farm, Bridport

Notes:

[1] WD/D/16/000486: Erection of retail warehouse unit for unrestricted A1 Non-food retail use. Total area of 1,895 sqm net of which maximum convenience goods floorspace is 569 sqm net and comparison goods floorspace is 1,326 sqm net.

[2] P/FUL/2020/00008: Erection of retail foodstore with associated car parking, access, landscaping and engineering works. Officer's report indicates an internal sales area of 1,161sqm net. Assumed that of this floorspace 70% will be for convenience goods and 30% for comparison goods.

[3] 3/17/3609/OUT: Outline application (All matters reserved except for access and associated link road); with up to 386 dwellings (Class C3); up to 1000sqm of retail units (Classes A1-A5); up to 900sqm of offices (Class B1) and up to 2200sqm of foodstore (Class A1); together with accesses, a link road and associated highway works, public open space including SANG, allotments, landscaping and associated works. In relation to the 2,200sqm gross foodstore (a 80% gross to net ratio has been applied and of which 80% is assumed for convenience goods and 20% for comparison goods) floorspace. Additionally based on the floorspace of 1,000 sqm gross for the retail units (a 90% gross to net ratio has been applied) and assumed for comparison goods floorspace only).

[4] 3/14/0016/OUT - Residential development of up to 630 dwellings, a new local centre, a replacement and extended Wimborne First School, public open space and new allotments together with new access, streets and other related infrastructure (All Matters Reserved). The Council has provided a gross floorspace estimate of some 1,400sqm. This has been netted down to 1,120 sqm net assuming a gross to net ratio of 80%. It is assumed that of this net total 80% will be for convenience goods (896 sqm net) and the remainder (20%) or 224 sqm net will be for comparison goods only.

[5] WP/16/00253/OUT - Outline application for a mixed use development comprising: up to 500 dwellings, including affordable housing; up to 8 ha of employment land (to include a new hotel, residential care home, car show rooms and other employment land); land for a new primary school; a new local centre; public open spaces, new accesses and roads, and associated infrastructure. The Council has provided a gross floorspace estimate of some 850sqm net has been netted down to 680 sqm net assuming a gross to net ratio of 80%. Of this it is assumed that 80% will be for convenience goods (544 sqm net) and the remainder (20%) or 136 sqm net will be for comparison goods only

[6] 2/2018/0036/OUT - Develop land by construction of an urban extension to the south of Gillingham between Shaftesbury Road (B3081) and New Road (B3092). The urban extension would comprise of up to 961 dwellings, up to 2,642 sq.m in a new local centre providing retail, community, health, and leisure uses, new and enhanced pedestrian/cycle routes, open spaces, roads, car parking and vehicular access. To include all ancillary works and associated infrastructure. (Outline application to determine access only). A1 (Convenience Retail) of 760 sqm GEA proposed. This has been netted down by 80% to 608 sqm net and for convenience goods only.

[7] WD/D/17/000986 - Outline application for the development of up to 760 dwellings, 60 unit care home (Use Class C2), 4 hectares of land for employment (Use Classes B1, B2, B8), mixed use local centre (Use Classes A1, A2, A3, A4, A5, B1, C3 and D1), primary school and associated playing fields (Use Class D1), areas of public open space and allotments, drainage works, the formation of new vehicular accesses to West Road and the formation of new pedestrian and cycle links. Assumed retail will not exceed 1,000sqm gross and assumed for convenience goods only. This has been netted down by 80% to 800 sqm net and for convenience goods only.

Table 4.3: Dorset Council Area Commitments: Comparison Goods

	CENTRE	PLANNING REF	LOCATION	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	Bradford Abbas Parish (Out-of-Centre)	WD/D/16/000486	Land adj. Unit 4, Peel Centre, Babylon Hill, Yeovil	N/A	1,326
[2]	Bradford Abbas Parish (Out-of-Centre)	WD/D/16/001406	Peel Centre Retail Park, Babylon Hill, Yeovil	207	145
[3]	Shaftesbury (Out-of-Centre)	P/FUL/2020/00008	Former Cattle Market Christys Lane Shaftesbury Dorset SP7 8PH	2,089	813
[4]	Blandford Forum (Out-of-Centre)	P/FUL/2021/00110	Unit 2 Glenmore Business Park, Shaftesbury Lane, Blandford Foru, DT11 7FP	333	266
[5]	Wimborne (Out-of-Centre)	3/21/0013/FUL	Jades Farm, Furzehill, Colehill, Wimborne, BH21 4HB	809	647
[6]	West Parley (Out-of-Centre)	3/17/3609/OUT	Land East of New Road, West Parley, Dorset	3,200	1,252
[7]	Wimborne Minster (Out-of-Centre)	3/14/0016/OUT	East and West of Cranborne Road, Burts Hill, Wimborne.	1,400	224
[8]	Littlemoor (Out-of-Centre)	WP/16/00253/OUT	Lands to north of Littlemoor Road, Weymouth	850	136

Notes:

[1] WD/D/16/000486: Erection of retail warehouse unit for unrestricted A1 Non-food retail use. Total area of 1,895 sqm net of which maximum convenience goods floorspace is 569 sqm net and comparison goods floorspace is 1,326 sqm net.

[2] Erection of an ancillary pod building inc. 2 no. A1/ A3/ A5 use units. Gross floor area of 207 sqm with assumed gross to net floorspace ratio of 70%. Assumed that net floorspace of 145 sqm will be for comparison goods only.

[3] P/FUL/2020/00008: Erection of retail foodstore with associated car parking, access, landscaping and engineering works. Officer's report indicates an internal sales area of 1,161sqm net. Assumed that of this floorspace 70% will be for convenience goods and 30% for comparison goods.

[4]P/FUL/2021/00110: Enclosure of the existing retail yard to provide a Class E/B8 unit and insertion of roller shutter doors into the front elevation. The application is for the enclosure of the existing retail yard to provide a Class E/B8 unit comprising 333 sqm (assumed gross). The existing retail yard and adjacent retail unit are currently occupied by ScrewFix, and the additional internal floorspace is proposed to be occupied by ScrewFix. This has been netted down by 80% to 266 sqm net and for comparison goods only.

[5] 3/21/0013/FUL: Change of use from greenhouse to retail unit and erect an entrance porch to the western elevation. The gross floorspace of some 809sqm net has been netted down to 647 sqm net assuming a gross to net ratio of 80%. It is assumed that this will be for comparison goods only i.e. gardening.

[6] 3/17/3609/OUT: Outline application (All matters reserved except for access and associated link road); with up to 386 dwellings (Class C3); up to 1000sqm of retail units (Classes A1-A5); up to 900sqm of offices (Class B1) and up to 2200sqm of foodstore (Class A1); together with accesses, a link road and associated highway works, public open space including SANG, allotments, landscaping and associated works. In relation to the 2,200sqm gross foodstore (a 80% gross to net ratio has been applied and of which 80% is assumed for convenience goods and 20% for comparison goods) floorspace. Additionally based on the floorspace of 1,000 sqm gross for the retail units (a 90% gross to net ratio has been applied) and assumed for comparison goods floorspace only).

[7] 3/14/0016/OUT - Residential development of up to 630 dwellings, a new local centre, a replacement and extended Wimborne First School, public open space and new allotments together with new access, streets and other related infrastructure (All Matters Reserved). The Council has provided a gross floorspace estimate of some 1,400sqm. This has been netted down to 1,120 sqm net assuming a gross to net ratio of 80%. It is assumed that of this net total 80% will be for convenience goods (896 sqm net) and the remainder (20%) or 224 sqm net will be for comparison goods only.

[8]WP/16/00253/OUT - Outline application for a mixed use development comprising: up to 500 dwellings, including affordable housing; up to 8 ha of employment land (to include a new hotel, residential care home, car show rooms and other employment land); land for a new primary school; a new local centre; public open spaces, new accesses and roads, and associated infrastructure. The Council has provided a gross floorspace estimate of some 850sqm net has been netted down to 680 sqm net assuming a gross to net ratio of 80%. Of this it is assumed that 80% will be for convenience goods (544 sqm net) and the remainder (20%) or 136 sqm net will be for comparison goods only.

4.33 It is assumed that all the identified committed floorspace will be open and trading by 2025.

It is forecast that this new floorspace in 2025 will achieve a total convenience turnover of £57.4m and a total comparison turnover of £33.5m (at 2020 prices). This forecast turnover of the commitments is then discounted from any residual expenditure capacity over the forecast period. The net residual expenditure capacity will be available to support new retail floorspace over and above all identified commitments.

Summary

- 4.34 This section has provided an update on the key assumptions and forecasts that determine the quantitative need (capacity) assessment. These are based on Experian Retail Planner Briefing Note 19 (January 2022); outputs from Experian's MMG3's latest average expenditure; UK 2021 Experian mid-year estimates and latest ONS inputs on population projections. A further iteration of the population growth has been incorporated to include the Council's projected population growth in terms of new housing.
- 4.35 These assumptions and forecasts underpin the quantitative need (capacity) assessment in the following section.

5. Retail Needs Assessment: Update

- 5.1 This section sets out the updated results of the quantitative need (capacity) for new retail (comparison and convenience goods under former use class A1) floorspace across the DC area over the period to 2040. These results update the capacity findings of the previous studies and also take account of the updates on the population projections, expenditure forecasts, and commitments.

Methodology

- 5.2 The update is based on the CREAT^e model and draws on the most up to date population and average retail (convenience and comparison goods) expenditure reviewed in the previous **Section 4**.
- 5.3 The capacity forecasts will enable DC to test the strategic options for the spatial distribution of any new retail-led development over the plan period to 2040, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in NPPF paragraph 85(d). The allocation of sites to meet any identified need over the next five years and over the lifetime of the emerging Local Plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres.
- 5.4 It has necessarily been assumed for the purpose of the capacity assessment that the (convenience and comparison goods) retail market is in 'equilibrium' at the base year. In other words we assume that existing centres and stores are broadly trading in line with appropriate 'benchmark' turnover levels at the base year and based on adjusted market shares for new store openings. Therefore, any residual expenditure available to support new retail floorspace within the study area over the development plan period is derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels; and the growth in 'benchmark' turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace³⁴.
- 5.5 For all existing and new convenience floorspace we have assumed an annual average 'productivity' growth rate ranging from a low of 0.2% (2023) to 0.3% (2023 and onwards). Corresponding annual productivity growth for comparison floorspace is higher, ranging from 2.2% (2023) to 2.4% (2024-28) and 2.9% (2029 and onwards). These growth rates have been informed by Experian's latest Briefing Note 19 (January 2022).

³⁴ The 'productivity' growth rates are based on Experian's latest Retail Planner Briefing Note 19 (January 2022). However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

5.6 At the outset we advise that all capacity forecasts beyond a five year period should be treated with caution. This is because long term trends in the economy, consumer demand and retail property market could have a significant impact on the potential capacity and need for new retail floorspace. For example, the pandemic has illustrated the rapid changing pace in consumer behaviour. As discussed previously, a higher growth in non-store retail sales (i.e. online sales) than forecast by Experian would reduce the capacity for new retail floorspace over time even further.

Retail Capacity Forecasts

5.7 In order to robustly assess the potential capacity for new **convenience goods** floorspace up to 2040 we have tested the performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket and Limited Assortment Discount (LAD) operators which together could achieve an average sales density of approximately **£11,000 per sq.m** in 2022 (2020 prices).

5.8 For **comparison goods** it is assumed that new floorspace will achieve average sales levels of **£6,500 per sq.m** in 2022.

5.9 As stated previously, it has been assumed that the local retail market is in 'equilibrium' at the base year, as there is no qualitative evidence to show that existing stores/floorspace at the local level are significantly over and/or under trading.

5.10 The baseline average sales levels for all new and existing convenience and comparison goods floorspace will experience a year-on-year growth in turnover 'efficiency' (floorspace 'productivity') levels in line with the latest forecasts set out in Experian's Retail Planner Briefing Note 19 (Figures 3a and 3b).

Capacity Forecasts: Baseline Scenario

5.11 The following sets out the convenience and comparison goods capacity forecasts for the DC area. The detailed capacity tabulations for convenience and comparison goods are set out in **Appendix 4 and 7** respectively.

Table 5.1: Retail Floorspace Capacity Forecasts (sqm net) : Baseline Scenario (sqm net)

	2025	2030	2035	2040
Convenience Goods Capacity	-5,291	-5,378	-5,499	-5,693
Comparison Goods Capacity	-5,144	-5,351	-5,782	-5,380

- 5.12 As stated previously, it has necessarily been assumed that the local retail market is in ‘equilibrium’ at the base year, as there is no qualitative evidence to show that existing stores/floorspace at the local level are significantly over and/or under trading.
- 5.13 Overall, the baseline capacity forecasts show there is **no** identified capacity for both types of goods or retail floorspace over the period to 2040.
- 5.14 A breakdown of the baseline capacity outputs by centre is detailed at **Appendix 4** and **7** (Table 6) for both convenience and comparison goods. Across both goods types there is no overall capacity at the unitary authority level. Where capacity has been identified it is nominal and can be met by the take-up and/or repurposing of vacant units and sites within the DC’s main centres and prime shopping locations. It could also be absorbed by existing operators.

Capacity Forecasts: Housing Growth Scenario

- 5.15 The capacity forecasts based on the composite housing growth scenario for both convenience and comparison goods are set out in **Appendix 10 and 13** respectively and summarised below.

Table 5.2: Retail Floorspace Capacity Forecasts (sqm net): Housing Growth Scenario (sqm net)

	2025	2030	2035	2040
Convenience Goods Capacity	289	-555	-2,764	-3,112
Comparison Goods Capacity	2,735	1,651	-1,917	-1,913

- 5.16 These forecasts show the following:
- Convenience Goods: a nominal capacity to 2025 but no identified capacity thereafter.
 - Comparison Goods: capacity to 2030 across the DC area but no identified capacity thereafter.
- 5.17 However these have to be interpreted with caution considering the following:
- predicated on the fact that the anticipated housing will be delivered;
 - considering changing consumer patterns and the rise in vacancies across centres.
- 5.18 Under this scenario, the capacity forecasts are again modest and are not of a sufficient quantum for the need to identify and allocate new sites. We advise that any residual expenditure capacity over and above that forecast for the baseline scenario will be absorbed by existing centres, shops and stores rather than representing the need for additional new retail floorspace. This residual expenditure will therefore help to support the vitality and viability of the existing network and hierarchy of centres, in accordance with the “town centre first” policy approach.
- 5.19 A breakdown by centre of the composite growth scenario capacity outputs is detailed at **Appendix 10 and 13** (Table 6) for both convenience and comparison goods. For

convenience goods this again shows that where capacity has been identified it is nominal and can be met by the take-up and/or repurposing of vacant units and sites within the DC's main centres and prime shopping location and could also be absorbed by existing operators. In relation to comparison goods the centres of Dorchester, Weymouth, Blandford Forum and Wimborne show a more sizeable capacity in 2025 approaching 500 sqm net or above (but which diminishes over the period to 2040). In our opinion this growth, driven by an increasing population, is very much contingent on the housing being delivered. As such, we would recommend that the Council undertakes a periodic review of the delivery of housing and associated trajectory accompanied by an up to date shopper survey to enable more accurate forecasting of floorspace capacity.

Summary

- 5.20 The NPPF (paragraph 86d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by *"looking at least ten years ahead"*. The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments *"...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed"*.. Therefore, whilst greater weight should be placed on forecasts over the next five to ten-year period, we have also assessed the potential capacity for new retail floorspace over the lifetime of the plan, up to 2040, to help inform DC's longer term plan-making and strategies.
- 5.21 As shown, under the baseline scenario, there is no quantitative requirement for the Council to identify and allocate new sites for retail development over the ten-year period up to 2031, or over the longer lifetime of the local plan to 2040.
- 5.22 In relation to any potential growth arising from any new housing we recommend that the Council monitors the delivery and trajectory periodically and facilitate an up to date shopper survey to enable more accurate forecasting of floorspace capacity.
- 5.23 A robust policy approach should therefore be adopted, especially development management policies in accordance with the NPPF (paragraphs 86 - 91), to enable the assessment and determination of future proposals that are not in a centre and not in accordance with an up-to-date development plan. The lack of capacity particularly emphasises the importance of the sequential test and having locally set thresholds for the undertaking of NPPF impact tests, to ensure that edge and/or out-of-centre proposals avoid causing any significant adverse impacts on centres.

6. Commercial Leisure Needs Assessment: Update

- 6.1 This section focuses on the potential need for new leisure uses and facilities in the Dorset Council (DC) Area over the period to 2040. This assessment necessarily focuses on the main leisure, entertainment and cultural uses identified by the NPPF (Annex 2). These uses are widely accepted as making a significant contribution to the overall vitality and viability of town centres, and should be located in town centres first in accordance with national and local plan policy objectives.
- 6.2 As described in **Section 2**, the Government's reform of the Use Classes Order came into effect on 1st September 2020. The table below summarises the impact of these reforms on the classification of the main food and beverage, commercial leisure and cultural uses.

Original Use Class ⁽¹⁾ :	Revised Use Class ⁽²⁾ :	Use:	Description:
Class A3	Class E	Restaurants and cafés:	Defined as selling food and drink for consumption on the premises.
Class A4	Class E	Drinking establishments:	Includes public houses, wine bars or other drinking establishments (but not night clubs), and drinking establishments with expanded food provision
Class A5	Sui Generis	Hot food takeaways:	Defined as the sale of hot food for consumption off the premises.
Class D1	Class F.1	Non-residential institutions:	Includes art galleries (other than for sale or hire) and museums.
Class D2	Sui Generis	Leisure/Recreation (indoor/outdoor)	Cinemas, music and concert halls, bingo and dance halls
Class D2	Class E		Gymnasiums or area for indoor recreations.
Class D2	Class F.2		Indoor or outdoor swimming baths, skating rinks and outdoor sports/recreations.
Sui Generis	Sui Generis	A use on its own	Theatres, nightclubs, casinos

(1) Town and Country Planning (Use Classes) Order 1987 (as amended)

(2) Revised Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (SI 2020 No.757).

- 6.3 It is important to understand at the outset that forecasting the need for new leisure uses is more problematic than for retailing, as the sector is highly complex and dynamic. For example, the demand for existing and new leisure uses and facilities is particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently, the methods developed to forecast the need for new leisure uses are necessarily more flexible, qualitative and high level. In this context LSH has developed robust and transparent approaches to assess leisure needs based on the following key inter-related workstreams:

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- A review of the key trends driving expenditure growth and market demand in the leisure sector over the last decade;
 - An audit of existing leisure provision in the DC area to help identify any significant 'gaps' in provision;
 - A review of leisure participation rates and preferences across the study area from previous studies; and
 - The application of a robust economic/quantitative need assessment for some leisure groups based on accepted approaches.
- 6.4 This section provides a summary of the key leisure trends, current provision and participation to help identify the potential (quantitative and qualitative) need for new uses and facilities over the plan period. As for the retail capacity assessment all leisure need forecasts should be treated with caution as they are subject to dynamic market and lifestyle trends and changes in the market demand and investment preferences of leisure operators.

Commercial Leisure Trends

- 6.5 Following a dramatic -37.2% fall in leisure spend per head in 2020, Experian forecast a return to growth in 2022 (+24.1%). Average yearly growth is then forecast to settle at approximately +1.1% over the period 2024-2028 and +0.9% over the long term (2029-2040). This growth in leisure spend is higher than the long term trend of -2.4% per annum over the period 1997-2020. These expenditure growth trends and forecasts have informed the updated leisure needs assessment. Any further dampening of growth rates over the short to medium term will have implications for the viability of existing leisure businesses and the demand for new space.
- 6.6 The pandemic has posed the most significant challenge to the commercial leisure industry in recent years. Never before has the sector been unable to operate in its entirety. With restriction on movement which is essential for commercial leisure pursuits including eating and drinking out or going to the cinema or gym. All of these sectors have suffered as a result and lockdown resulted in a more home focused consumer.
- 6.7 Despite such restrictions, during the course of the pandemic and subsequent waves of reopening and lockdowns commercial leisure businesses have tried novel methods of positioning themselves to surmount the reliance on customers being physically present to purchase their services. For example:
- McDonalds, Burger King, Wagamama have benefitted from drive-through and delivery service;
 - Many food and beverage outlets/restaurants which were closed to in-house customers provided takeaway and home delivery services and home-cook meal kits;

-
- Some restaurants with outdoor seating on terraces etc. were able to re-open subject to the necessary social distancing being applied.
- 6.8 Whilst it is too soon to assess the impact on footfall and sales, both, will take time to get back close to pre-pandemic levels. By way of example, the 'Eat Out to Help Out' initiative was a significant success in the summer of 2020 and boosted the sector through a 50% discount to customers being underwritten by the UK Government. Success in the future will be contingent on type and location of destination. For example major city centres and tourism destinations where commuters and tourists are a driver of footfall and spending are likely to recover slowly. According to Springboard³⁵, 2021 saw an increase in footfall to Food & Beverage outlets to 27.3% in 2021 from 22% in 2020. Visits to hospitality outlets rose significantly as restrictions were lifted and the vaccination programme rolled forward.
- 6.9 It is anticipated that the post-pandemic demand for leisure is unlikely to decline but will be dependent on broader economic recovery and prevailing consumer confidence. The anticipated focus on more working from home will result in local areas benefiting from any uptake in leisure provision. This is likely to benefit independents and potentially chains moving into these locations as they rethink their location strategies and could therefore potentially benefit centres in the DC area.
- 6.10 The key issues for commercial leisure provision in a post pandemic world will encompass a number of factors, particularly:
- economic recovery and resulting consumer sentiment (e.g. income growth and rising cost inflation);
 - the pent-up demand for consumers to meet and socialise after waves of lockdown;
 - the rise in home working and benefiting local / suburban locations and businesses;
 - rise of home delivery;
 - as with the retail sector new digital strategies and multi channels to interact with customers; for example, Costa has developed what it is calling a 'post-coronavirus' format: a street-facing kiosk with socially-distanced seating and in-app ordering; and
 - the increase in the use of open spaces and pursuits; for example, the number of drive-in cinemas across the U.K. has grown from three to 40 during the pandemic³⁶.

³⁵ Springboard's Annual Review: The Year That Was 2021 (February 2022)

³⁶ Source: "U.K. Drive-Ins Boom in Pandemic Era With 40 New Cinemas"; Variety Magazine 21/07/2020 (<https://variety.com/2020/film/news/uk-drive-in-cinemas-boom-40-venues-comscore-1234712174/>)

Leisure Expenditure Growth

- 6.11 The leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the sector has been significantly impacted by the pandemic, the fact is that leisure and entertainment activities remain an important lifestyle and entertainment choice for many consumers over other areas of spending.
- 6.12 Average spend on leisure services is dominated by Food and Beverage ('F&B'), which includes cafés, restaurants and bars. F&B accounts for approximately 55% of all average spend per capita on leisure services within the study area. For example, in the Study Area average spend per capita on F&B is £1,459, compared with the next highest average spend on cultural services of £395 and gambling ('games of chance') at £238.

Table 6.1 Estimates of Expenditure per Capita on Leisure Services (2022)

	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
Zone 1	£136	£297	£241	£77	£112	£1,092	£1,955
Zone 2	£186	£348	£250	£112	£168	£1,324	£2,387
Zone 3	£224	£405	£233	£132	£188	£1,458	£2,640
Zone 4	£254	£421	£230	£135	£192	£1,489	£2,720
Zone 5	£207	£362	£231	£121	£197	£1,407	£2,525
Zone 6	£230	£393	£216	£129	£182	£1,413	£2,563
Zone 7	£262	£439	£200	£148	£206	£1,537	£2,791
Zone 8	£250	£436	£219	£132	£185	£1,475	£2,696
Zone 9	£242	£422	£219	£133	£201	£1,457	£2,675
Zone 10	£210	£377	£218	£113	£157	£1,331	£2,407
Zone 11	£236	£439	£222	£136	£209	£1,475	£2,717
Zone 12	£230	£407	£215	£132	£191	£1,419	£2,593
Zone 13	£233	£349	£203	£115	£191	£1,590	£2,681
Zone 14	£224	£346	£209	£116	£185	£1,498	£2,578
Zone 15	£234	£360	£216	£129	£224	£1,473	£2,637
Zone 16	£231	£389	£256	£139	£212	£1,470	£2,697
Zone 17	£269	£425	£245	£156	£233	£1,534	£2,862
Zone 18	£271	£445	£228	£156	£253	£1,552	£2,905
Zone 19	£228	£372	£218	£124	£219	£1,505	£2,667
Zone 20	£221	£374	£254	£127	£201	£1,425	£2,602
Zone 21	£277	£448	£321	£147	£274	£1,545	£3,010
Zone 22	£300	£440	£389	£154	£304	£1,634	£3,221
Total Study Area (Zones 1-22) Average (£)	£234	£395	£238	£130	£204	£1,459	£2,660
(% of Total)	8.8%	14.9%	8.9%	4.9%	7.7%	54.9%	100.0%
DC Area (Zones 1-12; 17,18) Average (£)	£229	£401	£226	£129	£191	£1,426	£2,602
(% of Total)	8.8%	15.4%	8.7%	5.0%	7.3%	54.8%	100.0%

Source: Experian MMG3

Leisure Expenditure Forecasts

- 6.13 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 19 (January 2022).

Table 6.2: Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2017	2018	2019	2020	2021	2022	2023	2024-28	2029-40
Leisure Spend Growth (%)	1.3	-1.8	1.1	-37.2	21.9	24.1	1	1.1	0.9

6.14 The base year expenditure per capita levels for leisure have been projected forward to 2040 using Experian's forecast annual growth rates above, and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services.

Table 6.3: Total Forecast Growth in Commercial Leisure Expenditure: 2022 – 2040 (£m)

Zone	2022	2025	2030	2035	2040	Change:	Change:
	(£m)	(£m)	(£m)	(£m)	(£m)	2022-2040 (£m)	2022-2040 (%)
Zone 1	21.9	28.3	30.2	32.0	34.1	12.2	55.9%
Zone 2	96.1	124.2	132.3	139.8	147.2	51.2	53.3%
Zone 3	29.7	38.9	42.0	44.8	48.0	18.2	61.3%
Zone 4	74.1	96.9	105.0	112.3	119.3	45.2	61.1%
Zone 5	44.7	58.2	62.7	67.2	72.0	27.3	61.2%
Zone 6	97.3	127.0	136.5	144.8	153.2	55.8	57.4%
Zone 7	24.2	31.7	34.6	37.1	39.7	15.6	64.4%
Zone 8	22.9	30.1	32.7	34.9	37.1	14.2	62.0%
Zone 9	69.5	90.2	96.3	101.8	107.3	37.8	54.4%
Zone 10	54.7	70.3	74.2	77.9	81.8	27.0	49.3%
Zone 11	45.8	59.2	62.6	65.8	69.3	23.5	51.2%
Zone 12	66.5	85.7	90.9	95.7	101.1	34.6	52.1%
Zone 13	167.0	214.2	226.8	237.2	247.6	80.7	48.3%
Zone 14	238.5	307.2	326.4	341.7	357.0	118.4	49.6%
Zone 15	85.9	110.9	118.1	124.5	130.9	45.0	52.4%
Zone 16	69.5	89.8	95.6	100.9	106.2	36.7	52.9%
Zone 17	117.4	151.6	160.8	168.7	176.4	58.9	50.2%
Zone 18	91.8	119.0	127.0	134.4	142.9	51.1	55.6%
Zone 19	189.5	244.3	259.1	272.6	286.7	97.2	51.3%
Zone 20	103.2	133.5	142.0	150.1	158.5	55.3	53.6%
Zone 21	104.6	134.9	143.2	151.6	160.5	55.9	53.4%
Zone 22	177.9	228.5	240.7	251.6	262.3	84.4	47.4%
Total Study Area (Zones 1-22) (£)	1,992.7	2,574.8	2,739.8	2,887.4	3,038.9	1,046.2	52.5%
DC Area (Zones 1-12; 17,18) (£)	856.6	1,111.4	1,187.9	1,257.1	1,329.2	304.6	55.2%

Source: Experian MMG3 (Spend per head figures combined with baseline population estimates).

6.15 The available commercial leisure expenditure across the defined Study Area is £1,992.7m in 2022. This is forecast to increase to £3,038.9m by 2040 (+52.5%, +£1,046.2m). Approximately 43% (£856.6m) of the total available expenditure in the Study Area is available to the representative DC area (Zones 1-12; 17, 18).

Eating and Drinking Out

6.16 The food and beverage (F&B) sector includes restaurants, cafés, bars and pubs (former Class A3-A5). These uses are integral to a town centre's wider offer and economy. A good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching 'dwell times' (i.e. the time people spend in centres), increasing 'linked' expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.

6.17 As identified previously, the F&B sector dominates average household expenditure and participation in leisure across the Study Area. Spend on F&B is also forecast to experience the greatest growth over the plan period. In theory, this expenditure growth should support the potential to enhance the scale, quality and choice of F&B uses across the DC area and

in its centres. In reality though, this growth will be determined by current and future trends in the sector and market demand.

- 6.18 Research shows that the multiple chains mainly dominated the expansion of the F&B sector up to 2017 when they accounted for almost half of all net new business openings. However, since 2017 a number of multiples in the casual dining sector have struggled against a backdrop of increased competition, rising costs and a tightening of consumer spending due to economic concerns. The reality is that too many F&B operators expanded too quickly into increasingly marginal locations, funded by private equity, and the market became saturated and unsustainable. The growth in the availability, convenience and speed of home deliveries driven by new technology and apps represents a further significant challenge to more traditional F&B operators. These challenges have been further accelerated by the impact of the COVID-19 pandemic.
- 6.19 It is likely that there will be an increase in business failures and closures during 2022/23 as the impact of the pandemic on sales, profit margins and rising debts deepens. Experts predict that this further “shakeout” in the sector will leave the proactively managed multiple and independent businesses that have strong brand loyalty and/or a clear differentiated offer as the main “winners”. This is illustrated by a number of recent success stories that provide hope for the sector, including Nando’s, the South African restaurant chain, and Gail’s Artisan Bakery.
- 6.20 F&B operators, like retailers, will also need to understand and cater for the needs of the changing demographic and consumer market to remain relevant and viable. For example, Millennials (under 35s) make-up almost one-quarter of the UK population and research shows that they spend a substantial 13% of their disposable incomes on eating and drinking out³⁷. Looking ahead, by 2025 it is estimated that Millennials will make up over 80% of all parents in the UK, meaning that restaurants, pubs and cafés will also need to evolve and adapt to cater for the changing needs of new ‘Millennial families’. This could be driven for example, by increasing emphasis on convenience, affordability, entertainment, uniqueness and the use of technology and apps.
- 6.21 Restaurant operators will therefore, as a minimum, need to make sure that they are easy to reach online and on social media with up-to-date menus and strong images, and adapt the latest technologies to drive online booking. It will also mean sourcing more organic, vegetarian/vegan and local sustainably sourced produce that respond to customers’ changing tastes and concerns with regard to climate change. For example, figures provided by the Vegan Society indicate that there are approximately 1.7m vegetarians in GB and over 900,000 vegans. Forecasts indicate that vegans and vegetarians could make

³⁷ Foodspark

up a quarter of the British population in 2025³⁸. This trend has impacted on the business models and menus of a number of the leading national restaurant and takeaway operators. For example, 'Pret A Manger' has some 400 outlets in the UK and acquired 110 outlets operated by its rival Eat in 2019. Pret plans to rebrand some of the acquired sites as 'Veggie Pret' to tap into this growth.

- 6.22 There is also the potential for restaurants and pubs to tap more into the growth in home deliveries following the impact of the pandemic, with the potential to reach new audiences and increase turnover at quieter times.
- 6.23 In this context it is no coincidence that the popularity of street food, market halls and "meanwhile"/"pop-up" restaurants and bars has also coincided with the growth in the spending power and influence of the Millennials. These more informal drinking and eating venues fulfil their desire to experiment and explore different styles of drink, food and new cuisines in exciting new and more informal environments. Trialling a "pop-up" site also represents an opportunity to test a new concept, gain a following, fine-tune details and secure investment before making a long-term commitment. The pop-up concept is also attractive to landlords and property companies who are increasingly nervous about signing long leases following numerous high profile restaurant closures. Examples include the Spanish 'small-plates' restaurant, Pilgrim, which started out with a six-month residency in Hackney before gaining the backing of Graffiti Spirits Group and opening their first permanent restaurant at the group's Duke Street Market in Liverpool. They have since tested the concept further with pop-ups in London and Liverpool allowing them to refine their menus and build an audience.
- 6.24 Based on the broad leisure expenditure profile, and as detailed previously the majority of the growth in leisure expenditure is weighted towards eating and drinking out (food and beverage). This highlights the potential to enhance the scale and quality of the food and drink offer in the centres in the DC area, subject to market demand. Within the representative DC Area (Zones 1-12; 17,18) the total available expenditure for food and drink in the Study Area is £468.2m in 2022 and this is forecast to increase by 55.2% (+258.4m) over the forecast period to 2040 to £726.7m.

³⁸ 'Future of Food Report', Sainsbury's.

Table 6.4: Representative DC Area (Zones 1-12; 17, 18): Total Leisure Spend Across (£m)

	DC Area (Zones 1-12; 17,18): Total Leisure Spend (£m)					Change:	Change:
	2022	2025	2030	2035	2040	2022-2040 (£m)	2022-2040 (%)
Accommodation	75.8	98.4	105.1	111.3	117.6	£41.8	55.2%
Cultural services	131.0	170.0	181.7	192.3	203.3	£72.3	55.2%
Games of chance	74.7	96.9	103.6	109.6	115.9	£41.2	55.1%
Hairdressing salons & personal grooming	43.0	55.8	59.6	63.1	66.7	£23.7	55.1%
Recreational & sporting services	63.8	82.8	88.5	93.7	99.0	£35.2	55.1%
Restaurants, cafes, etc.	468.2	607.5	649.4	687.2	726.7	£258.4	55.2%
Total	856.6	1111.4	1187.9	1257.1	1329.2	£472.6	55.2%

Source: Experian MMG3 (Spend per head figures combined with baseline population estimates).

6.25 Drawing on market shares and retention levels, it is possible to carry out a high-level assessment of the potential need for new food and beverage uses. As previously detailed this assessment is not accompanied by a new household survey and is reliant on previous studies. The studies indicate the following:

- Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council – centres within the Council area having a retention level of 82.8%³⁹; and
- Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils – focussing on centres in East Dorset in particular having market shares for key centres between 3.9% (Ferndown) and 66.2% (Wimborne) for ‘eating out’ to 5.1% (Ferndown) to 64.9% (Wimborne) for ‘drinking out’⁴⁰. Furthermore, analysis of the household survey⁴¹ accompanying the study, specifically in relation to participation on leisure activities, shows that in East Dorset Zone 6, 66.3% of the respondents participated in visiting pubs/bar and 78.3% frequented a restaurant; in the North Dorset Zone 10 the figures showed 44.9% of the respondents participated in frequenting pubs/bar and 60.8% frequented a restaurant.
- The historic Poole and Purbeck Study (November 2014) does not provide an overall comparator but details popular destinations for leisure services by Zone. Relevant zones to this study these include Swanage (Zone 1); Wareham (Zone 2); Puddletown (Zone 3) and Lytchett Matravers (Zone 9). Popular destinations for restaurants/cafes are Swanage (Zone 1; 56%); Poole and Wareham (Zone 2; 24% each respectively), Dorchester and Blandford Forum (Zone 3; 34% and 18% respectively) and Poole and Wimborne (Zone 9 – 17% and 20% respectively)⁴².

³⁹ Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council; Paragraph 20.4.

⁴⁰ Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils, Table 5.11.

⁴¹ Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils, Appendix 6, Q38.

⁴² Poole and Purbeck Town Centres, Retail and Leisure Study (November 2014), Table 8.1

6.26 Based on the above, and to help inform the high-level assessment of the potential need for new food and beverage uses over the forecast period, we have tested a reasonable retention level of between 60% and 80%. This results in retained F&B expenditure (or turnover) of between £280.9m and £374.6m in 2022, which is forecast to increase to between £436m and £581.3m by 2040.

Table 6.5: Total Leisure Spend Across DC Area (£m)

	2022	2025	2030	2035	2040
DC Area - Available Spend on F&B	£468.2	£607.5	£649.4	£687.2	£726.7
DC Area - Participation Levels (%)	60% - 80%	60% - 80%	60% - 80%	60% - 80%	60% - 80%
DC Area - Market Share (£m)	280.9 - 374.6	364.5 - 486	389.6 - 519.5	412.3 - 549.8	436 - 581.3
DC Area - Benchmark Turnover (£m)	280.9 - 374.6	298.1 - 397.5	329.2 - 438.9	363.4 - 484.5	401.2 - 535
Net Residual F&B Spend Capacity (£m)	0 - 0	66.4 - 88.5	60.5 - 80.6	48.9 - 65.3	34.8 - 46.3

6.27 Using a similar approach as for the assessment of retail capacity, we have applied a robust year-on-year 'productivity' (sale 'efficiency') growth rate of +2% to the retained turnover of between £280.9m and £374.6m in 2022 to allow for existing businesses to cover their reasonable costs over time to remain viable. This produces a net residual expenditure capacity of between £34.8m and £46.3m in 2040. Based on the available evidence and LSH's market intelligence, it is assumed that the average turnover of cafés, restaurants and/or bars is around £1 million per annum. This produces the potential for approximately 34 to 46 F&B outlets by 2040, based purely on the growth in F&B expenditure.

6.28 In our opinion, not all the available spend growth will be available to support new F&B businesses. As detailed previously this is a sector that has been hit hard prior to, and even more so, during the pandemic and the broader macro-economic position will also influence discretionary leisure spending. The sector was effectively shut down and carried high overheads. On this basis, it can be reasonably assumed that a proportion of the growth will need to be absorbed by existing businesses to cover the debt incurred during the pandemic, rising operational/occupancy costs and inflation. Notwithstanding this, it is clear that there is forecast growth available to sustain new cafés, restaurants and bars, but very much subject to market demand.

6.29 Focusing new uses in the main town centres will help increase competition and consumer choice, and to underpin both daytime and evening economies. In most cases the forecast need and any market demand from operators will be satisfied by the take-up of suitable vacant units in existing centres, the repurposing of floorspace and/or as part of mixed use developments.

Cinemas

6.30 The UK cinema sector has evolved dramatically since the 1990s when it was largely dominated by a handful of national multiples. Today the sector offer ranges from larger multiplexes⁴³, to smaller independent operators and ‘pop up’ venues. The table below sets out some of the main cinema operators in the UK.

Table: 6.6: Main Cinema Operators in the UK

Operator/ Brand:	No. of Cinemas	Description:
Cineworld	116	Established in 1995. The first cinema opened in Stevenage in 1996. Acquired the Picturehouse Cinema chain in 2014 (see below). Cineworld is the leading cinema operator in the UK (based on revenue).
Odeon/UCI	120	Established in 1930s. In July 2016, Terra Firma sold Odeon/UCI to the Chinese-owned AMC Entertainment group.
Vue	93	Established in 2003, following the acquisition of Warner Village for £250m. Grown through new development and acquisitions (e.g. acquired 7 Ster Century cinemas in 2005 and 15 Apollo cinemas in 2012). In June 2013, the business was sold to Canadian investment firm OMERS Private Equity and Alberta Investment Management.
Everyman	35	Established in 2000. Acquired the Screen Cinemas chain in 2008 and 4 cinemas from Odeon in 2015. Increased its revenue by 27% in 2018 and opened 7 cinemas in 2019.
Picturehouse	26	Established in Oxford in 1989. Differentiated by its unique locations, homely atmosphere, and art-house film. Cineworld acquired the entire chain for £47.3m in 2012.
Showcase	19	Established in 1986. Owned by National Amusements Inc
Empire	14	Established in 2005, but has its origins in the Empire on Leicester Square which opened in 1884. Formed following the purchase of 11 former UCI and Odeon cinemas for c.£50m that had to be divested by Terra Firma (see above). Cineworld acquired 5 cinemas from Empire in 2016 for £94m, including the flagship cinema in Leicester Square.
Reel	10+	Established in 2001, following the purchase of Curzon in Loughborough. Independently owned and branded as Reel Cinemas in 2005. Following their acquisition of Apollo, Vue sold 4 cinemas to Reel.
The Light	9	Established in 2007. Multiplexes in Wisbech, Cambridge, Walsall, Bolton, Sheffield, Stockport, Bradford and Addlestone. Trialled its first 3-screen cinema in Thetford, Norfolk - opened in 2016.
Movie House	3	Established in 1990. Based in Northern Ireland and acquired the UGC (ex MGM/Virgin) multiplex in Belfast City Centre. Also owns two other multiplexes in Northern Ireland.

Source: LSH Research

6.31 Although year-on-year admissions and box-office takings are notoriously volatile - driven by the appeal of individual films and Hollywood ‘blockbusters’ - the long-term trend since the mid-1980s has been upward, and has principally been driven by the development of new cinemas. The growth in the cinema sector over the last 10-20 years is even more impressive when one considers that this has occurred against the increase in new and sophisticated in-home entertainment, driven by new technology, choice and flexibility (including, for example, Sky, Netflix and Amazon, and in 2020 the launch of the Apple TV and Disney platforms).

6.32 As the competition in the sector has increased, cinema operators have responded by introducing changes to the cinema experience, including new innovations in technology, improvements to the auditoriums and the introduction of higher quality refreshments,

⁴³ In general a multiplex is considered to be any cinema with five screens or more, though some of the largest multiplex sites have as many as 12 or 16 screens.

alcohol and food. For example Odeon has introduced their luxury 'Luxe' branding into a number of converted and new cinemas since 2017, and this evolved into the opening in 2019 of its premium 'Luxe & Dine' concept in Islington, north London, which is specifically aimed at adults. Showcase also introduced their 'Cinema De Lux' branded multiplexes in 2014, beginning with the conversion of its cinema in Bluewater. This subsidiary brand puts emphasis on customer service, lush décor, high quality food and other high-end amenities, and 13 other Showcase multiplexes have since upgraded to the Cinema de Lux brand.

- 6.33 There has also been a growth in smaller (Digital) cinemas serving smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry", as they do not require large auditoriums. There are therefore opportunities to provide a modern cinema offer in existing (repurposed) buildings and shopping centres, or as part of a mixed use offering. Other trends in the sector include the growth of 'pop-up' cinemas. Although there appears to be no reliable or recent data on the UK 'pop-up' cinema market, it is estimated that there were some 800-1,000 screenings in 2018, with 650+ screenings in London alone. Analysts estimate that the sector has a market value of circa £10m and has the potential to grow at between 20-25% per annum. Luna Cinema is the market leader and is reported to have achieved a turnover of around £3m in 2019 from around 175-200 screenings per year. Other niche operators in this space include Rooftop Film Club London, Backyard Cinema, Secret Cinema, Pop-up Screens and The Nomad Cinema.
- 6.34 The pandemic has hit the cinema industry hard, particularly for the major chains. As previously mentioned smaller nimble operators have found novel ways to show films. A temporary or mobile cinema (referred as a pop-up cinema) such as drive-in cinemas and UK's smaller independent chains, Curzon, Picture House (which is owned by Cineworld) and Everyman have fared much better during the pandemic. They have shown a more diverse selection of films, and with high-quality food offering, fully stocked bars and high-end seating, attracting more visitors during periods in which restrictions have eased. The future growth in the sector is dependent on the levels of available discretionary spending . Cinema trips will remain a significant and popular leisure activity for all age groups. Notwithstanding this, the competition from home entertainment and alternative at-home film channels will intensify and cinema operators will have to keep updating and adapting their offer to respond to consumer needs.
- 6.35 The table below shows the cinema provision in the DC Area:

Table 6.7: DC Area: Cinema Facilities and Screens

Venue
Bridport Arts Centre, Bridport
Electric Palace, Bridport
Moviola Rural Cinema, Beaminster
Odeon, Dorchester
Plaza Cinema, Dorchester
Regent Cinema, Lyme Regis
Cineworld, Weymouth
The Exchange Cinema, Sturminster Newton
Tivoli Theatre, Wimborne Minster
Rex Cinema, Wareham
Mowlem Theatre, Swanage

- 6.36 The high-level assessment of the potential need for new cinema in the DC area is based on standard approaches that draw on published national and regional ‘screen density’ averages (i.e. the number of screens per 100,000 population). According to the latest available research⁴⁴, the current UK average is 6 screens per 100,000 people – down from 6.6 screens in 2017 and 6.1 screens in 2014. The equivalent figure for the South West region is a higher 7.3 screens per 100,000 people.
- 6.37 To derive the broad retention levels we have drawn on previous studies which indicate the following:
- Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council – venues within the Council area having a retention level of 79.3%;
 - Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils - focussing on venues in Wimborne/East Dorset attaining a market share of 21.3% and Dorchester 45.1% in its core zones. Furthermore, analysis of the household survey⁴⁵ accompanying the study specifically in relation to participation on leisure activities shows that in East Dorset Zone 6, 64% of the respondents visited a cinema and in the North Dorset Zone 10 the figure was 53.6%.
 - The historic Poole and Purbeck Study (November 2014) does not provide an overall comparator but details popular cinema for leisure services by Zone. Relevant zones to this study these include Swanage (Zone 1); Wareham (Zone 2); Puddletown (Zone 3) and Lytchett Matravers (Zone 9). Popular cinema destinations by these zones were

⁴⁴ Source: BFI - 2021 Statistical Handbook, Comscore, Office for National Statistics (ONS)

⁴⁵ Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils, Appendix 6, Q38.

Empire, Poole and Mowlem Swanage (Zone 1; 30% and 14% respectively); Empire, Poole and Odeon, Dorchester (Zone 2; 28% and 27% respectively), Odeon, Dorchester and Empire, Poole (Zone 3; 49% and 23% respectively) and Empire, Poole and Tivoli, Wimborne Minster (Zone 9 – 38% and 7% respectively).

6.38 Based on the above a broad retention level of between 60% and 80% from DC area has been tested. The table below shows the potential quantitative need for additional cinema screens to 2040 based on the population projections previously described.

Table 6.8: DC Area: Potential Capacity for New Cinema Screens

	2022	2025	2030	2035	2040
Population (DC Area: Zones 1-12 ; 17,18)	405,319	410,461	417,006	421,987	426,629
Retention Level	60%	60%	60%	60%	60%
Potential Cinema Catchment Population (DC Area: Zones 1-12 ; 17,18)	243,191	246,277	250,204	253,192	255,977
Retention Level	80%	80%	80%	80%	80%
Potential Cinema Catchment Population (DC Area: Zones 1-12 ; 17,18)	324,255	328,369	333,605	337,590	341,303
Cinema Screen Density (screens per 100,000 persons) based on South West Region	7.3	7.3	7.3	7.3	7.3
Cinema Screen Potential	18 - 24	18 - 24	18 - 24	18 - 25	19 - 25
Existing: Screen Numbers	24	24	24	24	24
Proposed: Screen Numbers	0	0	0	0	0
Net Screen Potential	No Capacity	No Capacity	No Capacity	1	1

6.39 The key steps in the assessment of cinema capacity involve applying the 60% - 80% market share ('retention level') for cinema trips in the DC area to the total population at the base year of 405,319 (in 2022). This produces a total "cinema-going population" of between 243,191 and 324,255 (in 2022). Applying the average screen density of 7.3 to this population, the forecasts show that there is no capacity for new cinema screens in the short to medium term with capacity emerging over the longer term of 1 cinema over the longer term to 2035-40.

6.40 In summary, there does not appear to be any significant capacity or demand for new cinema provision in the DC area. Notwithstanding this, should market interest and demand arise from cinema operators seeking representation in the area, this should be directed to the main centres in DC area first to further help diversify their daytime and evening economies, and strengthen their competitive positions.

Health & Fitness Need

6.41 This is another sector that has been badly hit by the pandemic, with lockdowns forcing the closure of facilities. It is undeniable that the pandemic has reinforced the need for outdoor activity particularly to support mental health and wellbeing. Furthermore as we have been under lockdown, alternative means of exercise have come to fore such as at-home workouts, digital work-outs and associated purchase of home gym equipment. For

example, Peloton (cycle fitness), saw demand surge during the pandemic. Whilst this was an accelerated reaction, the long term impact of this remains unclear.

6.42 Notwithstanding the impacts of the pandemic, research⁴⁶ indicated that the UK Health & Fitness (H&F) industry was stronger than it had ever been pre-pandemic as measured by the number of gyms, membership and market value. For example, the headlines for the 12 month period up to the end of March 2019 showed that the number of fitness facilities in the UK increased to 7,239 (compared with 6,435 in 2016), and total membership grew by +4.7%, to 10.4 million between 2018-19. It is also apparent that the structure of the UK H&F sector has evolved significantly over the last decade to reflect changes in consumer choice and trends. The table below shows the top 10 operators in the sector in 2020, ranked by number of facilities. Other major operators just outside the top 10 include Virgin Active, JD Gyms, Sports Direct and Total Fitness

⁴⁶ *State of the UK Fitness Industry Report (2019)*. Leisure DB (formerly the Leisure Database Company). The research is compiled by independent leisure market analysts.

Table 6.9: Main Gym Operators in the UK

Operator/Brand:	UK Facilities	Position	Notes
Pure Gym	250+	Budget	Established in 2009. Acquired all gyms from LA Fitness in 2015. Most locations are open 24 hours and offer cardio equipment, fixed/free weights and exercise classes.
Anytime Fitness	166	Budget	24-hour health and fitness club. Membership rates vary by club.
The Gym Group	159	Budget	Established in 2007. 24-hour access. No fixed contract; membership starts from £10.99/month.
Snap Fitness	123	Mid-Market	Established in 2003. A privately owned and operated club.
DW Sports Fitness	120	Mid-Market	Established in 2009 following purchase of 50 JJB Sports Fitness Clubs and the attached retail stores for £83m.
David Lloyd Leisure	112	Premium	Established in 1982. Provide a family-orientated, high-quality fitness and leisure facility. Whitbread PLC acquired the company in 1995 for £182m. It is now owned by TDR Capital.
Nuffield Health	111	Mid-Market	Acquired 35 Virgin Active clubs in 2016 at a reported cost of £80m. Membership rates vary by club and locations, but start from circa £60/month.
Energie Group	100+	Mid-Market	Established in 2003. Clubs are typically between 5,000-25,000 sq.ft and comprise a café/ lounge area, fitness area, studio, locker rooms and showers. Many include spa areas, swimming pool, treatment rooms and spinning studios.
Bannatyne's	70	Premium	Established in 1997. Growth driven by new openings and acquisitions; including the purchase of the LivingWell Premier Health club chain from the Hilton Hotel UK Group in 2006. Also operates 37 spas and five hotels across the UK
Exercise4Less	50+	Budget	Gyms are mainly located in the Midlands and North. Gyms in South are in Hounslow, Harlow, Southend, Milton Keynes, Bath and Bristol. Offer a full boxing ring and combat classes. Membership starts from £9.99/month off-peak.

6.43 The value and budget gym operators have experienced the most significant growth in recent years. According to figures by Leisure DB, budget gyms now account for over one-third of gym memberships in the UK. The budget business model is normally based on 24-hour opening, discounted monthly subscriptions (ranging from £9.99 up to £20), 'pay-as-you-go' rather than 'upfront' annual memberships, and gym-goers providing their own towels, toiletries and locker padlocks. The popularity of the budget gyms is best reflected by the rapid expansion and success of Pure Gym since it was founded in 2007, along with relatively new entrants to this sector (such as Fitness4Less, Fitspace, TruGym, and SimplyGym). As a result the budget gym sector is becoming increasingly "crowded" and competitive, and operators are constantly striving for differentiation. Notwithstanding this, we anticipate that there will be some restructuring and consolidation within the budget gym sector as the market evolves, particularly post pandemic.

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- 6.44 The growth of the budget gym operators has also ‘squeezed’ the memberships and viability of some of the established mid-market chains, such as LA Fitness and Fitness First. This has resulted in the increasing polarisation of the gym sector between the budget operators at the value end of the spectrum, and the more exclusive health and fitness centres at the higher, more expensive end. As a result, analysts predict that those mid-market gym operators that are neither very cheap, nor particularly exclusive will struggle to maintain market share in the competitive market place unless they revise their business models. Furthermore, as operators compete against the “at-home fitness” revolution (e.g. Peloton), boutique studios and tech-enabled fitness, they will need to evolve to be more than “just gyms”. As with trends in the retail sector, experiences and entertainment will be key to attracting and retaining customers. For example, there has been continued investment into fitness and entertainment or ‘fitness-tainment’⁴⁷ over the last few years and analysts predict that there is plenty of opportunity for future growth.
- 6.45 The table below shows the current representation of the main national, regional, independent, privately owned health and fitness operators in the DC area, along with Council-owned leisure centres. The table shows a good representation of independent facilities, supplemented by public sector facilities and no representation of multiple operators.

⁴⁷ This includes activities such as watching entertaining content during workout sessions in gyms to more curated experiences during gym/exercise sessions,

Table 6.10: DC Area: Leisure Centres and Fitness Clubs

Name	Town	Public	Private
B-Fit Community Sports Hall and Swimming Pool	Beaminster		<input checked="" type="checkbox"/>
Blandford Forum Gymnastics Club	Blandford Forum		<input checked="" type="checkbox"/>
Blandford Leisure Centre	Blandford Forum	<input checked="" type="checkbox"/>	
New Body Fitness Bridport	Bridport		<input checked="" type="checkbox"/>
Bridport Leisure Centre	Bridport	<input checked="" type="checkbox"/>	
BH Live Active	Corfe Mullen		<input checked="" type="checkbox"/>
Physiques & Shapes Health Club	Dorchester		<input checked="" type="checkbox"/>
1610 Dorchester Sports Centre	Dorchester	<input checked="" type="checkbox"/>	
ForFit Fitness And Dorset Martial Arts	Dorchester		<input checked="" type="checkbox"/>
Saint Osmunds Community Sports Centre	Dorchester		<input checked="" type="checkbox"/>
Anytime Fitness	Dorchester		<input checked="" type="checkbox"/>
Charlton Down Health & Fitness Centre	Dorchester		<input checked="" type="checkbox"/>
BodymattersMotion Physiotherapy	Ferndown		<input checked="" type="checkbox"/>
RiversMeet	Gillingham	<input checked="" type="checkbox"/>	
Fitness by design	Gillingham		<input checked="" type="checkbox"/>
The Toning Suite	Gillingham		<input checked="" type="checkbox"/>
B Health & Fitness	Lyme Regis		<input checked="" type="checkbox"/>
California Fitness	Lyme Regis		<input checked="" type="checkbox"/>
R Lukins Fitness	Pimperne		<input checked="" type="checkbox"/>
Osprey Leisure Centre	Portland	<input checked="" type="checkbox"/>	
BMV Health and Fitness	Shaftesbury		<input checked="" type="checkbox"/>
Gryphon Sports Centre	Sherborne		<input checked="" type="checkbox"/>
Oxley Sports Centre	Sherborne		<input checked="" type="checkbox"/>
Sherborne Sports Centre	Sherborne		<input checked="" type="checkbox"/>
SPFit	Sherborne		<input checked="" type="checkbox"/>
Sturfit, Pete's Functional Fitness Club/Gym	Sturminster Newton		<input checked="" type="checkbox"/>
Redlands Community Sports Hub	Weymouth	<input checked="" type="checkbox"/>	
Weymouth Swimming and Fitness Centre	Weymouth	<input checked="" type="checkbox"/>	
Weymouth College Community Sports Centre	Weymouth	<input checked="" type="checkbox"/>	
New Body Fitness	Weymouth		<input checked="" type="checkbox"/>
3d Health and Fitness	Weymouth		<input checked="" type="checkbox"/>
QE Leisure Centre	Wimborne	<input checked="" type="checkbox"/>	
Wimborne Boxing Club	Wimborne		<input checked="" type="checkbox"/>
Phoenix M M A	Wimborne		<input checked="" type="checkbox"/>

Source: LSH Research

6.46 In terms of fitness/health activity participation rates we have drawn on previous studies which indicate the following:

- Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council – venues within the Council area having a retention level of 16.6%; and
- Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils - East Dorset attains a market share of 16.4%. Furthermore, analysis of the household survey⁴⁸ accompanying the study specifically in relation to participation on leisure activities shows that in East Dorset Zone 6, 33.6% of the respondents visited a health & fitness club and in the North Dorset Zone 10 the figure was 20.8%.
- The Poole and Purbeck Study (November 2014) details popular health and fitness provision by Zone. Relevant zones to this study these include Swanage (Zone 1); Wareham (Zone 2); Puddleston (Zone 3) and Lytchett Matravers (Zone 9). Popular destinations were Swanage (no identified facility) (Zone 1; 6%); Meyrick Park,

⁴⁸ Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils, Appendix 6, Q38.

Bournemouth (Zone 2; 6%), Dorchester Sports Centre (Zone 3; 11%) and Virgin Active, Poole (Zone 9 – 6%).

- 6.47 Based on the above we have tested a reasonable retention level of between 15% and 20%. In terms of the need for new health club/gym facilities, the latest projected growth in the DC area based on the representative zonal area population is some 11,687 up to 2030 and up to 21,310 by 2040. By applying the participation rate for gym and health club activities (15% and 20%) results in some 1,753 – 2,337 potential new gym members over the period to 2030 and 3,197 – 4,262 over the period to 2040. Based on average membership levels for key premium gym operators (average 2,897 members per facility) or a budget gym (which 3,452 average members per facility) the projections cannot support these type of operators over the period to 2030 and potentially up to one such operator by 2040.
- 6.48 As for the other leisure sectors, attracting new health and fitness facilities will be determined by the level of market interest and demand. This is likely to be more subdued in the short term especially as operator priorities are likely to be focussed on establishing membership levels to pre-pandemic levels.

Gambling Venues

- 6.49 Gambling represents a significant component of the leisure industry. The main sectors comprise 'games of chance' (namely bingo clubs, casinos, betting shops and amusement arcades). The latest research⁴⁹ indicates that the gambling industry in Great Britain generated a Gross Gambling Yield (GGY) for up to March 2021 of £14.2bn (comparable with the pre-pandemic £14.4bn in the year end to March 2019).
- 6.50 Remote (or online) gambling with a £5.7bn GGY comprises 39.9% of the overall market. Remote sector GGY increased by £426.3m (+8.1%). Online casino games dominate the sector, generating £3.2bn in GGY, mostly from slots games. GGY for remote betting totalled £2.3bn, led by football and horse betting. Remote bingo grew 0.9% to £176.8m.
- 6.51 National Lottery ticket sales increased by £696.4m to £7.9bn. This supported a GGY equivalent increase of £319.9m (10.4%), to £3.4bn, making the National Lottery the second largest sector by GGY.
- 6.52 The growth of remote and online gambling, alongside changes in regulations reducing maximum stakes for slot machines saw a decrease of £42.8m (-4.0%) in GGY, to £1.0bn. This was caused by a decrease in GGY from casino games of £38.8m (-4.6%). GGY from

⁴⁹ The Gambling Commission – Industry Statistics (November 2020) – this contains a full data set.

casino-based machines decreased by £3.9m (-1.8%). The overall number of licensed gambling premises in Great Britain has fallen by 685 to 10,098 (-6.4%). The majority of these were betting premises which declined by 639 (-7.7%).

6.53 The following assesses the main trends in this sector, current provision and the potential need/demand for new uses and facilities.

- **Bingo Halls** - in response to falling admissions bingo operators are increasingly taking advantage of the online market, and embracing smart-phone technology through new 'app' development. This forms part of a wider trend and has fuelled the growth in 'remote/online' gambling (which includes gambling activities through the internet, telephone, radio, etc.). Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. At the opposite end of the scale, research⁵⁰ shows that 55-64 age group has generated the biggest growth in online gambling as more mature bingo players switch to online bingo sites, as they grow in confidence with the new technology. These trends have resulted in the closure of many bingo halls in centres across the UK over the last decade, and the prospects for new openings are limited. There is limited representation in the DC area with Leo Leisure Bingo, Weymouth being the only commercial representation.
- **Casinos** - the latest figures published by the Gambling Commission show that non-remote casinos achieved a GGY of £1bn in the year end to November 2020 this was 4% down on GGY from 2019. There were some 154 casinos in 2019 and the number of venues has increased steadily from 143 in 2009. The casino sector is dominated by two companies: the Rank Group with 67 venues has a 44% market share and Genting UK has 44 venues and a 29% market share. There has been some consolidation of the sector in the past few years, such as Rank Group's purchase of Gala Coral Casinos. There is no representation in the Dorset Council area with main provision outside in Bournemouth that includes both a Grosvenor and Genting Casino.
- **Betting Shops** - there were some 6,735 betting shops in Great Britain in 2020, a decrease from 8,320 in March 2019 and also down from 9,111 in 2014 due to regulatory changes introduced in 2015 which led to a fall in revenue and profit. William Hill accounted for 27% of all premises in 2019, Ladbrokes had a 22% share, Tote's market share was 19% (following its purchase of Betfred), and Gala Coral Group's share was 18%. As gambling activities continue their shift to online channels,

⁵⁰ Gambling Commission (February 2019). Gambling Participation in 2018: behaviour, awareness and attitudes – Annual Report.

so the demand for physical outlets will inevitably dampen in the future and more betting shops will inevitably close. The presence of betting shops in high streets is also a contentious issue due to the perceived social, economic and health/wellbeing impacts on individuals and households. The Government has recognised that betting shops have specific impacts and in 2016 reclassified their use from Class A2 to 'Sui Generis'. This reclassification means local authorities have greater planning powers to manage the number of outlets and therefore greater potential to limit impacts.

6.54 Based on current provision, market and consumer demand, there appears to be no demonstrable need to enhance existing provision to help improve its competitive position and the choice of venues in its main centres. Current trends also indicate that gambling activity growth will be online, rather than a need to provide more physical venues. Future demand for new venues is therefore expected to be very limited. If demand does arise in the future over the plan period, it should be directed to town centres first in accordance with national and local plan policy objectives.

Other Commercial Leisure

6.55 Other commercial leisure facilities can be grouped together under 'family entertainment venues' (FEVs), which include paid activities that appeal to adults and children (such as, for example, tenpin bowling, roller skating, ice skating, and similar uses).

- **Tenpin bowling** – is possibly the most popular activity in the 'family entertainment' sector. After a period of decline in the 1970s, there are currently some 320 venues in the UK according to Mintel figures, and this sector was valued at £250m in 2021. A number of the successful bowling facilities opened over the last 15-20 years (e.g. Hollywood Bowl and Ten Entertainment)⁵¹ tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. The critical mass of leisure uses "under one roof" help to underpin the viability of tenpin bowling centres, as they tend to struggle as standalone destinations. The sector is evolving from old-style bowling alleys, to modern, multi-generational entertainment centres where bowling is blended with other forms of activity alongside an enhanced dining offer. This is balanced by the growth of smaller independent specialist bowling facilities (such as, for example, All Star Lanes and Bloomsbury Bowl). Within the DC area there is limited ten pin bowling provision with the Jurassic Fun Centre (Bridport), providing this form of entertainment as part of a multi-venue facility. The main

⁵¹ Hollywood Bowl was founded in August 2010 and is the market leader in the tenpin bowling sector. It operates 59 venues under the Hollywood Bowl, AMF and Bowlplex brands. Its expansion has been driven by opening new sites, including recently in Dagenham and Yeovil. Ten Entertainment operates 44 venues and its growth strategy is focussed more on acquisitions of distressed assets than opening new venues, and then modernising the facilities to drive growth and value.

provision is outside of the DC area with Hollywood Bowl being represented in Yeovil, Poole and Bournemouth. It is estimated that the 320 venues in the UK represent approximately one venue for every 250,000 people, which compares with approximately three per 250,000 in the USA. Based on the forecast population for the DC area of 426,629 by 2040, this could potentially accommodate one more such facility subject to market demand and directed to town centres first in accordance with national and local plan policy objectives.

- **Trampoline Parks** - over recent years there has also been growth in other more specialist commercial leisure attractions, such as trampoline parks. Since the opening of the first indoor parks in the UK in 2014, trampolining has become one of the UK's fastest growing sport and leisure trends. It is estimated that there were some 150 parks in the UK in 2017/18, with the potential capacity for between 250-300 parks before saturation is potentially reached. This mirrors the growth in the United States and Australia, where parks first emerged in the early to mid-2000s. The main operators in this sector include Oxygen Freejumping⁵², Ryze⁵³, and Gravity Active Entertainment⁵⁴. The public sector is also investing in trampoline parks, including Eastbourne Borough Council, Waltham Forest Council and Tameside Metropolitan Borough Council. At Tameside, for example, the new Total Adrenaline trampoline park, which opened in November 2016, forms an important part of a £20m investment project that aims to get people more physically active. Research shows that, on average, over one-third of "jumpers" are aged between 6-10 years and over one-quarter are aged between 11-15 years. These younger age groups require a parental guardian or authorised person for entry and, as a result, the trampoline venues are attracting wider families and groups, who are generating 'spin-off' expenditure to other uses and facilities both within and outside the venues. In response to the broad range of "jumpers", trampoline parks are also offering a range of activities and experiences that cater to the needs of a broader demographic, including dodge-ball tournaments, rock-climbing, ninja courses, laser tag and other social events. Trampolining venues in the DC area are limited and it is noted that the Weymouth College Community Sports Centre includes trampoline and gymnastics provision.

⁵² Oxygen Freejumping has parks in Acton (West London), the O2 in Greenwich, Croydon, Derby and Southampton. It also acquired Air Space in 2017, a subsidiary of the high wire adventure company Go Ape. However pre-pandemic Oxygen closed parks in East Kilbride (June 2018) and Wolverhampton park (December 2018) due to reported "trading difficulties".

⁵³ Ryze is a Scotland-based operator with three parks in Edinburgh, Glasgow and Dundee. These parks range in size from 929 sqm (10,000 sqft) to 1,208sqm (13,000 sqft).

⁵⁴ Gravity Active Entertainment is a Castleford-based operator with 11 parks, mainly as part of existing shopping or adventure centres. Its venues include the Xscape in Castleford and Milton Keynes, Bluewater Shopping Centre and Riverside Entertainment Centre (Norwich).

6.56 The provision of Family Entertainment Venues in the DC area is shown below:

Table 6.11: DC Area: Family Entertainment Venues

Name	Town
Crazy Monsters	Blandford Forum
Freshwater Holiday Park	Bridport
Dorset Adventure Park	Corfe Castle
Kingston Maurward Animal Park	Dorchester
Insight Activities (Dorset)	Dorchester
Vurlands Animal Farm	Dorchester
Climb Aboard	Gillingham
Lyme Regis Marine Aquarium	Lyme Regis
Farmer Palmer's Farm Park	Organford
Coolplay,	Sturminster Newton
Putlake Adventure Farm	Swanage
Monkey World	Wareham
Sealife	Weymouth
Weymouth Pavilion	Weymouth
Sandworld	Weymouth
Granby Fun Factory	Weymouth
Abbotsbury Swannery	Weymouth
Alexandra Gardens Pleasure Grounds	Weymouth
Blooming Kids!	Weymouth
Fantasy Island	Weymouth

Source: LSH Research

6.57 In broad terms, there is the further potential to increase family-oriented venues and activities in the DC area subject to market demand.

Theatre and Cultural Activities

6.58 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. This assessment is concerned with the provision and potential need for theatres and museums in the DC area. As shown below the provision is extensive covering specialist museums, crafts and theatres.

Table 6.12: DC Area: Theatre and Cultural Venues

Name	Town
North Dorset Railway	Blandford Forum
Bridport Museum	Bridport
Bridport Arts Centre	Bridport
Terracotta Warriors Museum	Dorchester
The Keep Military Museum	Dorchester
Mill House Cider Museum	Dorchester
Dorset Museum	Dorchester
The Tutankhamun Exhibition	Dorchester
Dorset Teddy Bear Museum	Dorchester
The Dinosaur Museum	Dorchester
Shire Hall Historic Courthouse Museum	Dorchester
Gillingham Museum	Gillingham
Marine Theatre	Lyme Regis
Lyme Regis Museum	Lyme Regis
Dinosaurland Fossil Museum	Lyme Regis
Portland Bill Lighthouse Visitors Centre	Portland
Portland Museum	Portland
Royal Manor Theatre	Portland
Shaftesbury Arts Centre	Shaftesbury
Gold Hill Museum	Shaftesbury
Sherborne Museum	Sherborne
Sturminster Newton Mill	Sturminster Newton
The Exchange Theatre & Cinema	Sturminster Newton
Swanage Railway	Swanage
The Mowlem Theatre & Cinema	Swanage
Swanage Museum and Heritage Centre	Swanage
Verwood Heathland Heritage Centre	Verwood
The Etches Collection Museum of Jurassic Marine Life	Wareham
The Tank Museum	Wareham
Weymouth Pavillion	Weymouth
Nothe Fort	Weymouth
Weymouth Museum	Weymouth
Waford Mill Crafts	Wimborne
The Tivoli Theatre	Wimborne
Museum of East Dorset	Wimborne

Source: LSH Research

6.59 Existing attractions should be promoted widely to build greater resilience and diversity into the various towns overall attraction and evening/daytime economy. The plans to convert the Maltings building at Brewery Square, Dorchester in to a theatre and arts centre is an example of this. Whilst this has stalled due to lack of funding there is a continued vision to improve Dorchester’s art and cultural offer.

Hotels

6.60 Dorset’s location is a key tourist and economic driver. As detailed earlier, the visitor economy is regarded as a catalyst for future growth. Hotel provision across the study area is largely focused within West Dorset and Weymouth & Portland.

6.61 The DC area is well served primarily by independent operators, with a modest representation by national operators as shown below:

Table 6.13: DC Area: Hotel Provision

Name	Town	Grade
The Ollerod	Beaminster	3-Star
Crown Hotel	Blandford Forum	3-Star
The Manor House Hotel	Bridport	2/3-Star
The Seaside Boarding House	Bridport	3-Star
The Bridge House Hotel	Bridport	3-Star
Hensleigh House	Bridport	2/3-Star
Fernhill Hotel	Bridport	3-Star
Bull Hotel	Bridport	2/3-Star
Westwood House Guest House	Dorchester	2/3-Star
The Kings Arms	Dorchester	3-Star
The Duchess of Cornwall Inn	Dorchester	3-Star
Acorn Inn	Dorchester	3-Star
George Albert Hotel	Dorchester	3-Star
The Poachers Inn	Dorchester	2/3-Star
Premier Inn Dorchester Hotel	Dorchester	Budget
Dudsbury Golf Club, Hotel & Spa	Ferndown	3-Star
The Heights Hotel	Portland	2/3-Star
Hotel Aqua	Portland	3-Star
Admiralty Hotel	Portland	3-Star
La Fleur De Lys	Shaftesbury	3-Star
Royal Chase Hotel	Shaftesbury	3-Star
Grosvenor Arms Hotel	Shaftesbury	3-Star
Half Moon Inn	Sherborne	2/3-Star
The Grange At Osborne	Sherborne	3-Star
The Eastbury Hotel	Sherborne	3-Star
Purbeck House Hotel	Swanage	3-Star
Swanage Haven Boutique Guest House	Swanage	2/3-Star
Caythorpe Guest House	Swanage	2/3-Star
Beachway Hotel	Swanage	2-Star
Danesfort Hotel	Swanage	2/3-Star
The Castleton Bed And Breakfast	Swanage	2/3-Star
Oxford Hotel	Swanage	2/3-Star
Grand Hotel	Swanage	3-Star
Pines Hotel	Swanage	2/3-Star
Limestone Hotel	Wareham	2/3-Star
West Lulworth House Hotel	Wareham	2/3-Star
The Castle Inn	Wareham	2/3-Star
Mortons Manor House Hotel	Wareham	4-Star
Springfield Country Hotel Leisure Club & Spa	Wareham	3-Star
The Priory Hotel	Wareham	3/4-Star
The Leam Hotel	Weymouth	2/3-Star
Alexandra Hotel	Weymouth	2-Star
Best Western Rembrandt Hotel	Weymouth	3-Star
Moonfleet Manor Hotel	Weymouth	3-Star
Russell Hotel	Weymouth	2/3-Star
The Berkeley Hotel	Weymouth	2/3-Star
The Cumberland	Weymouth	2/3-Star
The Hotel Central	Weymouth	2-Star
The Rex	Weymouth	2/3-Star
Crown Hotel	Weymouth	2-Star
Hotel Prince Regent	Weymouth	3-Star
Bourneville Hotel	Weymouth	2-Star
Royal Hotel	Weymouth	3-Star
Bayview Hotel	Weymouth	2/3-Star
The Kings Head Hotel	Weymouth	2-Star
Premier Inn Weymouth Seafront Hotel	Weymouth	Budget
Premier Inn Weymouth Hotel	Weymouth	Budget

Source: LSH Research

6.62 As part of the need to diversify the offer in centres, and to build greater resilience into their daytime and evening economies, we advise that the Council should continue to proactively market and promote the DC area to help draw year-round visits from day-trippers,

“weekenders” and tourists. In this way, there may be potential opportunities for future growth in accommodation sector.

Summary

- 6.63 The review of the commercial leisure sector has focused on updating the quantitative need for new food and beverage provision, cinema screen, and health and fitness facilities.
- 6.64 The commercial leisure industry is presently under the shadow of the impact of the pandemic whose effects over the long term are unclear. The consumer, after almost two years of various forms of lockdown, is eager to venture out and this may provide an interim boost to the sector, particularly the food and beverage sector as consumers are able to engage more socially. However there remains the prospect of a shakedown and retrenchment as the industry consolidates its revenue position and adapts to the new normal.
- 6.65 On this basis whilst there is the prospect of growth based on demand across the food and beverage, we recommend that the Council review and refresh this assessment when more normal conditions return. In all cases, it has to be emphasised that any demand for space will be dependent on market interest.

7. Key Findings & Recommendations

- 7.1 This final section provides high-level advice and recommendations to help Dorset Council effectively plan and manage the vitality and viability of its centres. The National Planning Policy Framework (NPPF) specifically states that planning policies and decisions should support the role that town centres play “*at the heart of local communities*” and should promote the long term vitality and viability of centres “*by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters*” (paragraph 86).
- 7.2 Aligned with the NPPF and National Planning Practice Guidance (PPG), our advice takes account of the lifetime of the plan, up to 2040, but specifically focuses on the next five to ten year period. We have robustly assessed both the quantitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses over the forecast period. These assessments have been informed by a comprehensive review and update of the dynamic economic and market trends that are impacting on the retail and leisure sectors. This includes the impact of the COVID-19 pandemic, which has effectively accelerated many of the long-term trends and structural changes that are placing significant pressures on the current and future performance and health of our towns, high streets and shopping centres.
- 7.3 This study also takes account of the series of reforms to the planning system issued by the Government over the last 12 months. These include updates and changes to Permitted Development Rights (PDR)⁵⁵; the reform of the Use Classes Order (UCO)⁵⁶; and the 2021 *Planning Reform Bill*.
- 7.4 It is against this background, including the on-going impacts of the pandemic, that we provide the Council with our robust recommendations to help inform plan-making and decision-making over the next 5-10 years, and over the lifetime of the plan, up to 2040. Our advice covers:
- the need (‘capacity’) for new retail (convenience and comparison goods) floorspace and other main leisure and town centre uses.
 - the requirement to allocate a range of suitable sites to meet the scale and type of any forecast need identified, looking at least ten years ahead (NPPF, paragraph 86d).

⁵⁵ The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020/755; & The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 3) Order 2020/756

⁵⁶ The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020/757 was laid before Parliament on 21st July 2020 and amended the Town and Country Planning (Use Classes) Order 1987. Came into effect from 1st September 2020.

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- the current definition of the network and hierarchy of centres, and whether this reflects existing and future shopping and leisure trends, planned investment and regeneration strategies, and future housing growth.
 - the setting of a local impact assessment threshold to inform the assessment and determination of applications for new retail and leisure developments proposed outside of town centres (NPPF, paragraph 90).

Covid-19: Potential Implications

- 7.5 Town centres have continued to face a myriad of challenges over the last 10 -15 years but which have been accelerated during the pandemic. Centres now need to embrace the new dynamic and build in resilience to adapt seamlessly to future changes in shopping habits, which are likely to move away from centres solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities.
- 7.6 The growth in online shopping, the long-term attraction of larger format and cheaper retail space in out of centre locations, and increasingly fragile retailer, investor and business confidence is affecting the vitality and viability of centres.
- 7.7 COVID-19 has created a perfect storm that is bearing down on town centres. The resulting challenge for DC is to manage and promote the future of current centres when retail is no longer the key driver of their vitality and viability.
- 7.8 In the context of the pandemic, it is also expected that this will lead to a structural shift in shopper habits as consumers try to respond to the new normal. While some well-known retailers will disappear as a result of the current crisis, the high street itself will not 'die'. The UK retail sector may be profoundly changed, but the hastening of trends such as move to town centre living and demand for new retail experiences may ultimately breathe new life into high streets. LSH anticipates that the trends that are likely to emerge include:
- **Survival of the fittest retailers** - Retailers that survive the crisis may find that their market positions are strengthened, as some of their competition disappears. Those in the best position to prosper may include strong high street names with a good mix of online and in-store operations. Local independent and artisan retailers may also be able to prosper by tapping into consumer demand for new retail experiences.
 - **Accelerated retail to residential conversions** - With new housing delivery high on the UK government's agenda, some landlords and developers may take the opportunity to ramp up plans to re-purpose struggling retail properties into residential units.
 - **From goods provision to services provision** - With town centre populations increasing due to retail-to-residential conversions, demand will grow for a wider range

of high street amenities to serve local communities such as education, healthcare facilities, dentists, hairdressers and beauticians.

- **Enhanced retail experiences** - The onus will be on physical retailers to attract consumers back to the high street with unique experiences that cannot be replicated online or at home. This may encourage the growth of pop-up shops, independent eateries and experiential retailers and local authorities may need to allocate resources to de-clone high streets in the post-pandemic world.
- **Growing need for local retail provision** - Smaller walkable local and neighbourhood centres serving local communities may ultimately benefit from the changing geography of retail demand.
- **Technology** - Centres will have to become 'smart' and make use of technology so that they are aligned with how customers shop and engage with brands. Flexibility and innovation will be essential if the high street is to remain relevant for consumers. Providing free Wi-Fi and online promotions to attract shoppers, tracking footfall and developing new high street apps and town websites will be essential. It means town centre shops will be able to better understand the needs of their customers that will help them tweak their opening times, offer digital promotions to encourage people in at quieter times. This will help towns understand their strengths, support community activities, help and aid businesses and bring a fresh vibrancy.

Reform of Use Classes Order & Permitted Development Rights

- 7.9 As previously mentioned, the Government has issued a series of reforms to the planning system. These reforms principally relate to Permitted Development Rights (PDR) and the Use Classes Order (UCO)⁵⁷, alongside the Government's White Paper "*Planning for the Future*" (published in August 2020) and the 2021 *Planning Reform Bill*.
- 7.10 The impact of the changes will still require the definition of a town centre boundary and a primary shopping area, or a primary 'commercial' area to be the foci for E and F Classes. Also, in most instances the former use classes can be 'translated' into the equivalent categories within the new E and F Classes. This can assist with the interpretation of policy wording and the effective use of conditions.
- 7.11 The changes have implications for the former designations of primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas, as a change of use between Class E does not constitute development and will therefore not require planning permission. It should be noted that the

⁵⁷ The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020/757 was laid before Parliament on 21st July 2020 and amended the Town and Country Planning (Use Classes) Order 1987.

effectiveness of frontage policies was declining before the pandemic and previous changes to the UCO.

- 7.12 Hence beyond 2022, town centres are likely to consolidate their retail and shopping role with more emphasis on place and non-transaction uses, this could include high activity based land uses such as health, education being located in more central locations and stem previous trends of decentralisation.
- 7.13 The increase in ‘city’ or ‘town centre’ living and residential development in town centres is likely to be a growth area in the next 10 years and could be a positive regenerative mandate. We also expect more emphasis on residential upper floor living accompanying ground floor commercial uses. This will build on existing strategies such as in the emerging Local Plan which states *“the use of upper floors for offices or residential uses is encouraged as it adds vitality to town centres without fragmenting the retail and services on the ground floors”* (paragraph 5.7.6)
- 7.14 Permitted Development Changes (Amendment No. 2) (2020) released in August 2020⁵⁸, introduced Class AA and AB that allows new residential on detached or terrace buildings in commercial or mixed use areas (but not in conservation areas). This could potentially lead to the loss of commercial floorspace to residential.
- 7.15 Furthermore, the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021 (Order) that came into force on 21 April 2021 creates a new class of permitted development right (Class MA) into the Town and Country Planning (General Permitted Development) Order 2015 (GPDO) authorising changes of use from Use Class E commercial uses to Use Class (C3) residential. The changes within the Order allow a change in the permitted use of a property or land from a use falling with Use Class E to Use Class C3 residential use where the property has:
- been in Class E use for 2 years (including time in former uses i.e. A1, A2, A3, B1, D1 or D2 now within that Class); and
 - has been vacant for at least 3 continuous months.
- 7.16 These changes replace existing retail, light industrial and office to residential rights with rights applying to all of the relatively recent Use Class E in which those uses now sit. Exercise of the right is subject to prior approval by the local planning authority and therefore are subject to some planning control. Details must be submitted relating to flooding, transport, contamination, noise amenity, natural light, fire safety and agent of change issues. The area that can be converted is capped, with a maximum size limit of 1,500 sqm of floorspace capable of conversion using the right.

⁵⁸ The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020.

7.17 The implications arising from these changes result in more flexibility and are likely to be focussed in the peripheral parts of existing town centres, reflecting the influence of land values, but the outcomes are unclear, particularly the likely scale of increased residential and loss of commercial space and this should be investigated and monitored further. In strategic terms, and especially for the future of town centres, the PDR deregulation is likely to add to the already high levels of uncertainty surrounding their future composition.

Article 4 Directions

7.18 The latest revision to the NPPF has tightened the rules and restricts the ability of local authorities to secure Article 4 directions (A4Ds). The revised version of the NPPF (paragraph 53) tightens this scope in relation to changes of use from commercial to residential, stating that such directions should be used where they are "*essential to avoid wholly unacceptable adverse impacts*". These impacts "*could include loss of the essential core of a primary shopping area*", thereby "*seriously undermining its vitality and viability*". However, the paragraph contains the caveat that such a direction would be "*very unlikely to extend to the whole of a town centre*".

7.19 Based on the above, the Council should be mindful of the following in considering the use of A4Ds:

- it will be difficult to restrict the use of PD rights using A4Ds;
- restriction is likely to be more difficult for residential PD rights than non-residential, but in all cases "robust evidence" will be needed to justify their use;
- there is a high bar set, and the scope of any A4D which is used must be limited geographically to the smallest area possible as opposed to an entire area being covered by an A4D; and
- in terms of this area, the Council will need to be clear with targeted evidence to show why PD rights need to be restricted e.g. loss of employment space; preserving community uses or protecting a historic area / amenity.

Retail Needs Assessment

7.20 This assessment has been prepared in the context of the many issues and challenges facing the UK's retail sector and high streets. These challenges have been driven by a combination of economic pressures, technological change (which has driven the growth in online activity and sales) and shifts in consumer behaviour. This has resulted in a significant year-on-year rise in business failures, with the resultant closure of stores and the significant loss of jobs. The pandemic has further accelerated and compounded these trends.

- 7.21 Over the last 12-24 months, for example, ASOS (the UK online fashion retailer) acquired the Arcadia stock, brands and websites (including for Topshop, Topman and Miss Selfridge), but not the “bricks-and-mortar” stores. The on-line retailer BooHoo also acquired the Burtons, Dorothy Perkins and Wallis brands, along with the Debenhams website and brands. The loss of the Arcadia-owned stores and Debenhams, along with failure of other major brands over recent years (including British Home Stores, House of Fraser and Mothercare), has placed significant downward pressure on retail values, at a time when retailers and landlords are facing rising costs and debts. In turn this has led to a number of poorly performing shopping centres and owners (e.g. Intu Properties) being forced into administration and a rise in vacancies.
- 7.22 Against this background industry experts agree and research shows that Britain is over-shopped; meaning there is simply too much retail floorspace in our towns and shopping centres. In turn, these trends are all impacting on the capacity and market demand for new retail floorspace.
- 7.23 Town centres in the Dorset Council area are not immune from these national and regional trends. The capacity forecasts are informed by the latest population and expenditure forecasts sourced from Experian Business Strategies⁵⁹. Experian’s forecasts take account of the potential impacts of the pandemic on retail expenditure levels over the short, medium and long term, and the growing market share of non-store retail sales (specifically online purchases).
- 7.24 The headline retail capacity forecasts are reproduced in the table below and show that under the baseline scenario there is no capacity for new comparison retail floorspace over forecast period to 2040, after taking account of all known commitments.

Table 7.1: Retail Floorspace Capacity Forecasts (sqm net)

	2025	2030	2035	2040
Convenience Goods Capacity:	-5,291	-5,378	-5,499	-5,693
Comparison Goods Capacity:	-5,138	-5,338	-5,780	-5,370

- 7.25 There is therefore no identified need. This is compounded by the fact that the impact of the COVID-19 is yet to be fully realised and there are extant commitments and vacancies within the DC areas centres. On this basis, any future investment should be directed to town centres to ensure their continued vitality and viability.
- 7.26 The Council should be mindful that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading

⁵⁹ Experian Business Strategies: *Retail Planner Briefing Note 19* (January 2022).

performance of existing centres and stores; the growth in population and retail spending; etc. The Council should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long and ultra-long term (10 years plus).

- 7.27 As this assessment represents a partial update, we would further recommend the Council undertakes an up to date assessment of market shares for its centres by way of a new Household Telephone Interview Survey (HTIS) at the earliest available opportunity to understand current shopping patterns.

Leisure Needs Assessment

- 7.28 The update has assessed the need for new commercial leisure uses and the 'gaps' in provision. As with retail, the leisure sector is facing significant challenges and pressures from changes in the economy, policy and consumer trends. On this basis whilst there is the prospect of growth based on demand across the food and beverage sector (F&B), we recommend that the Council review and refresh this assessment when more normal conditions return.
- 7.29 Even under normal circumstance it is difficult to predict the need and demand for new leisure uses, as the sector is very diverse and highly influenced by market, lifestyle and consumer trends. Predictions as to likely future need, even over the short term (i.e. the next 2 years), have been further complicated by the impact of the pandemic on leisure expenditure trends and growth, consumer preferences and business viability.
- 7.30 Notwithstanding these caveats, commercial leisure uses are a critical part of the overall offer and attraction of centres. They make a significant contribution to their overall diversity, vitality and viability of centres, and to their daytime, evening and night-time economies⁶⁰. As part of their future adaptation and growth, it is therefore important that the Council maintains and promotes diverse and flexible leisure uses, venues and events in its centres.
- 7.31 Against this background the headlines from the leisure needs assessment show:
- In relation to the **F&B sector** and based on the available evidence there is the potential for approximately 34 to 46 F&B outlets by 2040, based purely on the growth in F&B expenditure. This does not preclude qualitative improvements or commercial market led operations being focused in centres. However, not all the available spend growth will be available to support new F&B businesses. As detailed previously this is a sector that has been hit hard prior to, and even more so, during the pandemic and

⁶⁰ The "evening" economy generally relates to all leisure activities that are open until around 11pm. The "night-time" economy is generally defined as businesses and activities with late night licences that are open beyond 11pm, particularly at the weekend.

the broader macro-economic position will also influence discretionary leisure spending. Any forecast need should be directed to the town centres first, and, to help increase competition and consumer choice, and to underpin both daytime/evening economies. In most cases the forecast need and any market demand from operators will likely to be satisfied by the take-up of suitable vacant units in existing centres, the repurposing of floorspace and/or as part of mixed use developments.

- In relation to the **cinema** sector, there is no identified quantitative capacity within the DC area over the short to medium term with capacity emerging over the longer term to 2035-40 of 1 cinema. There is currently a good provision of cinemas across the DC area (some 24 screens). Notwithstanding this, cinema operators are expanding their venue portfolios into regional towns. If commercial demand comes forward, this should be directed to strategic and town centres first in accordance with national and local policy objectives.
- The high-level assessment on **health and fitness** venues (principally gyms) shows that the projected growth in the population over the plan period could potentially sustain up to one such operator ('premium' or 'budget') by 2040.
- With regard to other commercial leisure uses, there is currently no identified need for **gambling venues** (e.g. bingo halls and casinos), **tenpin bowling**, **trampoline parks**, or other facilities. There is also a good provision of historic and **cultural** attractions for residents and visitors.

7.32 It should be emphasised that the forecast need for new commercial leisure uses will be subject to wider economic, consumer and market trends, and will depend on the demand from leisure operators for representation in the DC area. Where demand does exist, new uses and activities should be focussed in town centres first, in compliance with national and local plan policy objectives to maintain and enhance their overall vitality and viability.

Accommodating Retail and Leisure Needs

7.33 The NPPF (paragraph 86d) states that planning policies should “...allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead”. Aligned with the NPPF, the NPPG identifies that town centre strategies should establish the potential for “...development or the redevelopment of under-utilised space” to accommodate the scale of assessed need, and the more effective and efficient use of land (for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs, or for converting airspace above shops). In turn, this will help to establish the need for centre “expansion”, “consolidation” and/or “restructuring”.

- 7.34 In this context, the retail capacity assessment has identified no forecast need for new retail floorspace up to 2040. In the absence of need it follows that there is no requirement to identify and allocate sites for new retail floorspace in DC's centres.
- 7.35 Furthermore, the capacity forecasts do not take account of current (or future) vacant retail floorspace in the main centres and shopping locations. Some of this vacant space (particularly in prime shopping streets) will be available and suitable for re-occupation, re-purposing and/or redevelopment both now and in the future.
- 7.36 In summary, we do not consider that there is a requirement for the local planning authority to identify and allocate sites to specifically accommodate new leisure uses or retail floorspace. The potential to redevelop and repurpose vacant premises and sites will, in our judgement, meet any potential need or market demand. However, the local authority should monitor wider trends on the retail and leisure sectors (and the capacity forecasts), and on the main centres on a regular basis including refreshing the household telephone interview survey to ascertain prevailing shopping patterns.

Network and Hierarchy of Centres

- 7.37 We have undertaken a high level review of the existing network and hierarchy of main centres in accordance with the advice set out in the NPPF (paragraph 86a) and NPPG⁶¹. Detailed healthchecks were not commissioned as part of this assessment and it is recommended that the Council should do so at the earliest opportunity to ascertain the impact of the pandemic on its centres.
- 7.38 This assessment relies on healthcheck assessments undertaken in the Council's previous studies as follows:
- The 'Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council' highlighted the following:
 - Dorchester, Bridport, Sherborne and Lyme Regis as Town Centres and Beaminster as a Local Centre. All defined centres are fulfilling their role and function and as such their position within the district's hierarchy of centres should be maintained. Additionally, that Poundbury be defined as a District Centre upon completion of Queen Mother Square (this has now occurred) and Local Centres be defined (which has also occurred as part of the emerging Local Plan documentation).

⁶¹ Planning Practice Guidance (PPG). Refer to Paragraph 004, Reference ID:2b-004-20190722.

- Blandford Forum, Gillingham, Shaftesbury and Sturminster Newton as Town Centres and Stalbridge as a District Centre. It was also recommended that the Council identify local centres as part of the retail hierarchy.
- Weymouth as a town centre and Easton (Portland) as a Local Centre with the need for the identification of local centres as part of the retail hierarchy.
- The 'Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils' concluded that the following retail hierarchy was appropriate:

Category	Centre
Town Centre	Christchurch, Ferndown, Verwood and Wimborne
District Centre	West Moors, Highcliffe
Local Centre	Purewell, Barrack Road, Corfe Mullen and West Parley
Parades	All other clusters of shops

- The Poole and Purbeck Town Centres, Retail and Leisure Study (November 2014) recommended the following hierarchy.

Category	Centre
Town Centre	Poole, Swanage, Wareham
Local Centre	Upper Parkstone, Ashley Cross, Broadstone, Corfe Castle, Wool
Other policy areas	Poole Quayside and historic quarter

7.39 The classification under the emerging Local Plan for the entirety of the Dorset Council area is as follows:

Table 7.2: Dorset Unitary Area: Network and Hierarchy of Centres

Town Centres	Blandford Forum; Bridport; Dorchester; Ferndown; Gillingham; Lyme Regis; Shaftesbury; Sherborne; Sturminster Newton; Swanage; Verwood; Wimborne Minster; Wareham; Weymouth.
District Centres	Queen Mother Square, Poundbury, Dorchester; Stalbridge; Upton; West Moors.
Local Centres	Abbotsbury Road, Westham (Weymouth); Beaminster; Bere Regis; Chickerell; Corfe Castle; Corfe Mullen; Easton Square, Easton (Portland); Fortuneswell (Portland); Littlemoor Centre (Weymouth); Lodmoor Hill (Weymouth); Lytchett Matravers; Marnhill; Portland Road, Wyke Regis (Weymouth); Southill Centre (Weymouth); West Bay; West Parley; Wool.

Source: Dorset Council Local Plan Consultation January 2021 (Figure 4.2)

7.40 This list underpins **Policy ECON 3** on the "Hierarchy of centres and the sequential test" that states:

ECON3: Hierarchy of Centres and the sequential test

- I. Town, district and local centres (identified in Figure 4.2) are the focus for town centre uses. Their vitality and viability will be strongly supported and promoted through planning decisions.
- II. New centres will be supported where they are of a scale and type to serve local needs and do not adversely affect the vitality and viability of any centres.
- III. In order to sustain and enhance the vitality and viability of centres, new proposals for town centre uses will be permitted in accordance with the sequential approach as set out in Figure 4.3. Development will be directed firstly towards 'in-centre' locations, followed by 'edge-of-centre' locations. Only if no town centre or edge of centre locations are available, should 'out-of-centre' sites that are, or will be, well served by a choice of sustainable modes of transport be considered.
- IV. Applications for town centre uses that do not pass the sequential test will be refused.
- V. The sequential approach will not be applied to applications for small-scale rural development (including offices), rural tourism, small-scale community facilities or trade-related uses on employment sites.

7.41 We consider that **Policy ECON 3** and the hierarchy to be appropriate based on the findings of the previous assessments. We reiterate that this should be reviewed when the Council undertakes a refresh of the healthcheck assessment for these centres.

7.42 **Section 2** has highlighted that under **Policy DEV 1** of the Local Plan Consultation (2021), there is a housing requirement to deliver a minimum of 30,481 dwellings over the period to 2038. Policies **DEV2-DEV5** set out how this will be delivered in the four Dorset functional areas. On this basis, some commercial provision will be warranted considering the scale of potential housing proposed over time. However, any new provision should be focused both in terms of location and scale in meeting the day-to-day needs of the new local residents and this principle should be applied to all such allocations. The main provision should be retained and remain within existing centres town centres to maintain their vitality and viability as per **Policy ECON 3**. Hence, it is assumed that the hierarchy of centres will also need to be reviewed in the future to reflect any new allocations of new local centres that may form part of emerging housing allocations.

Town Centre Boundaries and Primary Shopping Area Definitions

7.43 It is a requirement of the NPPF that planning policies should “...define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre” (paragraph 86b). In this context, **Policy ECON5** refers to the boundaries of town centre areas and primary shopping areas (PSAs) as defined in the Policies Map as follows:

ECON5: Management of centres, primary shopping areas and markets

- I. The boundaries of town centre areas and primary shopping areas are defined on the Policies Map.
- II. Development proposals for town centres uses will be supported if of a type and scale appropriate to the size, role and function of the centre.
- III. Development proposals for retail and other town centre uses in primary shopping areas will be supported where:
 - a positive contribution is made to the vitality, viability and diversity of the primary shopping area and centre; and
 - an active ground floor use is maintained or provided.
- IV. New or relocated markets should be directed towards the primary shopping areas in prominent and accessible locations. Proposals that prejudice the future operation of existing markets should be refused.
- V. Public realm improvement measures intended to enhance the vitality of centres and to increase footfall are encouraged.
- VI. The use of upper floors of premises in centres for residential or other uses will be encouraged subject to the ground floor use not being undermined and, where possible, separate access to the upper floors being provided.
- VII. Planning conditions and / or planning obligations will be used where necessary and justified to prevent town centre uses being located outside centres and to maintain the predominant retail function of primary shopping areas.

7.44 We advise the Council to review these boundaries through a detailed and up to date healthcheck assessment of the centres. Together with the output of this assessment, which has identified no forecast need for new retail floorspace up to 2040, the Council will be better informed to assess the definition of boundaries.

Local Floorspace Impact Threshold

7.45 As described in **Section 2**, the NPPF requires an impact assessment to be undertaken for “*retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan*” (paragraph 90). Local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold, but if there is no local threshold, then the NPPF default threshold (2,500 sqm gross) should be applied. To help inform the setting of an appropriate impact threshold we have also referred to the PPG⁶², which states that it will be important to consider the following:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;

⁶² Planning Practice Guidance: Paragraph: 015, Reference ID: 2b-015-20190722

- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment

7.46 It is noted that the emerging Dorset Council Local Plan Regulation 18 document, **Policy ECON 4** on 'Town centre impact assessments' provides:

ECON₄: Town centre impact assessments	
I.	Proposals for retail and leisure development above minimum local gross floorspace thresholds, in locations outside of the town centre areas shown on the policies map are required to submit an impact test to support the proposal.
II.	Development likely to lead to a significant adverse impact on existing centres will be refused.

7.47 Furthermore, the preceding narrative before this policy sets out the following local thresholds:

Figure 7.1: Emerging Local Plan: Local Impact Thresholds

Local impact threshold (Gross floorspace)	Centre	Proposed centres hierarchy position
200 m ²	Swanage, Upton, Wareham	Town centre
	Bere Regis, Corfe Castle, Lytchett Matravers, Wool	Local centre
300 m ²	Blandford Forum, Bridport, Dorchester, Gillingham, Lyme Regis, Shaftesbury, Sherborne, Sturminster Newton, Weymouth	Town centre
	Queen Mother Square (Poundbury, Dorchester), Stalbridge	District centre
	Abbotsbury Road (Westham, Weymouth), Beaminster, Chickerell, Easton Square (Easton, Portland), Fortuneswell (Portland), Littlemoor Centre (Weymouth), Lodmoor Hill (Weymouth), Portland Road (Wyke Regis, Weymouth), Southill Centre (Weymouth), West Bay	Local centre
500 m ²	Verwood	Town centre
	West Moors, West Parley	District centre
1,000 m ²	Ferndown, Wimborne Minster	Town centre

Source: Dorset Council Local Plan Consultation (January 2021), Figure 5.4

7.48 We recommend that a harmonised impact threshold of **280 sqm gross** would be more appropriate and robust for assessing the impacts of any proposed retail/leisure developments outside of defined centres in accordance with paragraph 90 of the NPPF. The justification and evidence to support this lower impact threshold is set out below:

- whilst no new health checks have been undertaken as part of this update, the available Experian Goad data for a selection of the centres⁶³ (see below) shows the average size of comparison goods units range from 108 sqm to 197 sqm, with an overall average unit size of 156 sqm. For convenience goods the average unit size is higher ranging from 122 sqm to 1,102 sqm with an overall average of 304sqm.

Table 7.3: Average Size of Comparison and Convenience Outlets by Centre (sqm gross)

Goods Type	Comparison			Convenience		
	Centre	Total Floorspace	Outlets	Average Outlet Size	Total Floorspace	Outlets
Blandford Forum	7,051	65	108	5,026	14	359
Gillingham	4,524	23	197	7,711	7	1102
Shaftesbury	6,791	49	139	6,011	13	462
Sturminster Newton	2,964	17	174	1,709	5	342
Weymouth	24,183	132	183	3,038	25	122
Dorchester	21,405	124	173	5,658	22	257
Bridport	14,130	77	184	3,632	17	214
Sherborne	9,300	79	118	5,007	15	334
Lyme Regis	5,416	49	111	1,756	12	146
Average Outlet Size	95,764	615	156	39,548	130	304

Source: Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council

- the growth in internet shopping is having a significant impact on the way households choose to buy food and non-food goods, which in turn is impacting upon retailer business and operating models. This should be considered alongside the long-term impacts of out-of-centre stores, shopping and leisure facilities on town centres. These impacts are probably best illustrated by the changes in the grocery sector over the last decade. Following a sustained period of growth over almost 20 years up to 2010, principally driven by new larger format superstore openings, the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) have effectively scrapped their superstore expansion programmes to focus on growing their market shares via online sales and opening smaller convenience stores (i.e. Sainsbury's

⁶³ Sourced from the Joint Retail and Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council. To note that the Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils, did not provide floorspace data for the centres that were assessed. The Poole and Purbeck Town Centres, Retail and Leisure Study (November 2014) also did not provide such data; however Paragraph(s) 9.2.33 and 9.2.34 of the study state, inter alia, "we have analysed current unit sizes in the three identified town centres – these average around 350 sq. m gross in Poole and 120 sq. m gross in Swanage and Wareham"... on this basis "the impact threshold for Poole at 400 sqm gross and Purbeck 200 sqm gross".

Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are promoting smaller convenience stores with a minimum gross floorspace of between 280 sqm and 372 sqm (circa 3,000 - 4,000 sqft).

- the updated capacity assessment for new retail (convenience and comparison goods) floorspace, focussing on the next five to ten years in accordance with the advice set out in the NPPF and PPG, but also taking the lifetime of the plan into account shows no capacity for new retail floorspace over the period to 2030, or over the lifetime of the plan to 2040. It is therefore critical to ensure that any planned or proposed investment in DC's centres and growth areas is not harmed by proposals for new floorspace of varying scale and use outside these areas and existing centres.
- the 280 sqm gross floorspace figure is also significant, as stores below this threshold are exempt from Sunday trading restrictions. In brief, the Sunday Trading Act defines a 'large shop' as generally being over 280 sqm. It is the Government's intention through this Act to protect smaller, independent stores which are perceived to be financially weaker and therefore require protection from unfair competition from the major supermarket operators. In general terms therefore it follows that proposals for retail floorspace over 280 sqm gross are unlikely to be a purely local facility and will have the ability to draw trade from outside of their immediate local catchment with potential consequent impacts on existing stores and centres. For example, in circumstances where convenience stores are proposed on the edge or outside of centres, often as part of petrol filling stations or conversions of public houses, they can have a significant adverse impact on the trading performance, vitality and viability of smaller local centres nearby. This will particularly be the case where these existing centres are dependent on smaller supermarkets and/or convenience stores to anchor their retail offer, and to generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities. In some cases post office counters can also form an integral part of the convenience store offer and attraction in smaller centres, and their future operation could therefore also be jeopardised by new convenience stores opening outside of centres.

Conclusion

- 7.49 In the context of the issues and challenges, and the findings of the capacity forecasts, it is clear that the Council needs to plan for **less**, not more, retail floorspace over the next 5-10 years and beyond. This emphasises the importance of having locally set thresholds for the undertaking of NPPF impact tests. Although retail will remain a key part of their overall offer, vitality and viability, helping to generate trips, footfall and spend, it is critical that the strategic policies in the emerging Local Plan are supported by policies and strategies developed for each centre to help promote greater flexibility and diversity, so that they can

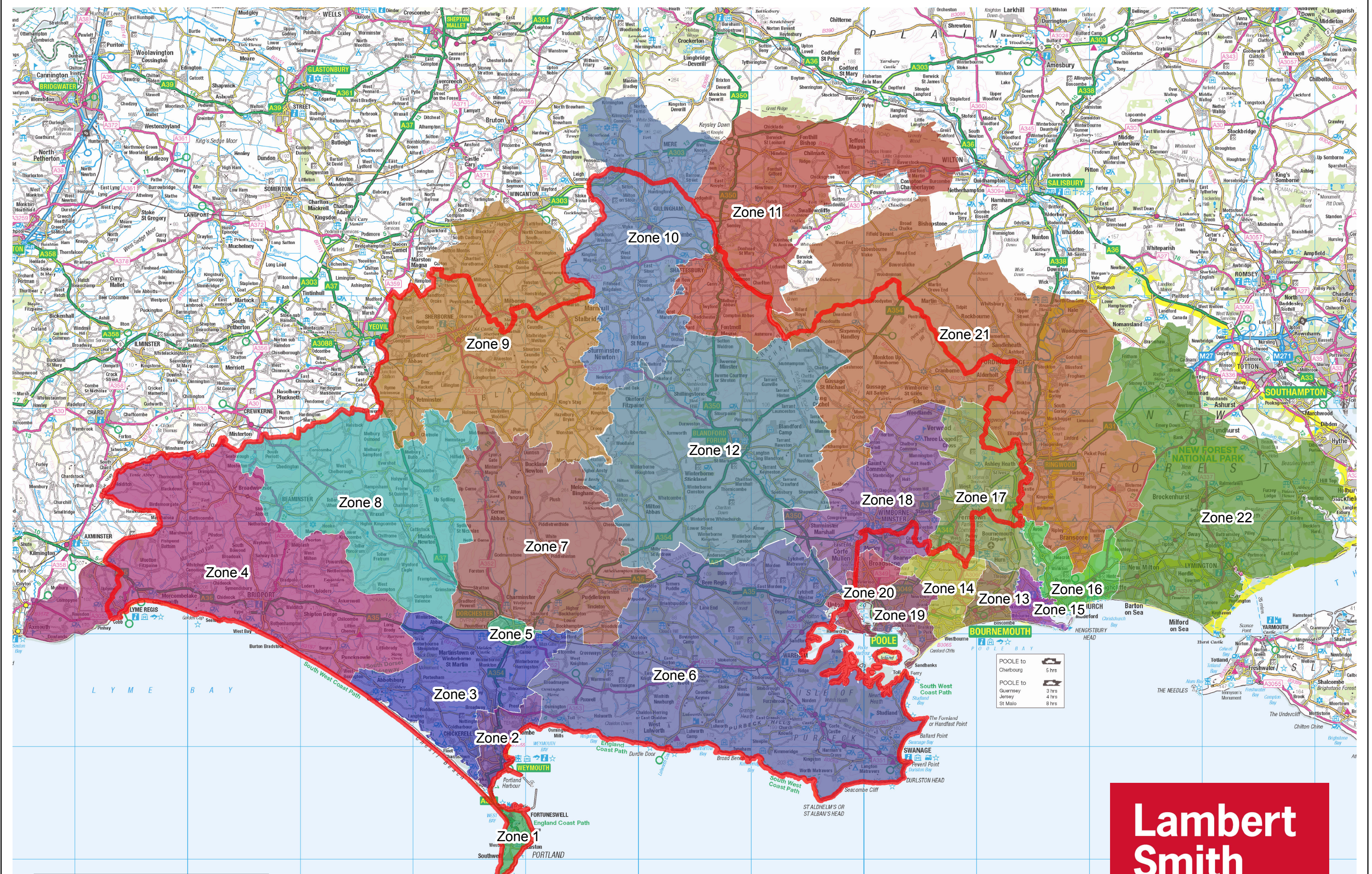
respond more effectively and rapidly to future trends. This flexibility and diversity will, in turn, help to create more resilient, attractive and successful town centres. It will also help to strengthen their respective roles in the network and hierarchy of centres as places to live, work, shop, study, play and visit for a wide range of uses and activities.

7.50 Notwithstanding their distinctive roles, characters and offers, the findings and wider trends point to a number of common themes and actions that apply to all of DC's centres and extend beyond retail. These include:

- The potential to provide a mix of new residential development in and on the edge of centres, which will help to maintain and strengthen their overall vitality and viability. Provision of the right type of homes, in the right locations that cater for the needs of different ages and socio-economic groups will help to generate new trips, footfall and spend for the benefit of existing shops and business, as well as supporting new provision.
- The trend to home-working that was a necessity during the pandemic, is predicted to continue. As a result, businesses are adapting their office and workspace needs. This should benefit commuter towns in a number of important respects. Firstly, more of the population working from home will meet their essential day-to-day needs close to where they live, which will help to strengthen the vitality and viability of centres and associated businesses.
- The need to invest in the quality of town centre environments - including frontages, streetscapes, buildings and public realm, including more outdoor space for pedestrians - to create more attractive, accessible, safe and "greener" (carbon neutral) environments that appeal to all ages and groups. The positive impacts on the environment and on health and well-being of introducing more planting (particularly of trees) and parks into centres, where space allows, should not be underestimated or undervalued.

~ End ~

APPENDIX 1:
Study Area Map



Legend
 Dorset Unitary Authority

POOLE to		5 hrs
POOLE to		3 hrs
Guernsey		4 hrs
St Malo		8 hrs

**Lambert
Smith
Hampton**

APPENDIX 2:
Baseline Scenario: Convenience Goods:
Population and Expenditure

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2022) POPULATION & PROJECTIONS (to 2040) GROWTH 2022 to 2040:

ZONE:	2022	2025	2030	2035	2040	%	2022-40
Zone 1	13,875	14,006	14,237	14,428	14,671	5.7%	796
Zone 2	49,933	50,379	51,033	51,578	51,922	4.0%	1,989
Zone 3	13,980	14,287	14,643	14,955	15,294	9.4%	1,314
Zone 4	33,790	34,512	35,553	36,343	36,926	9.3%	3,136
Zone 5	21,947	22,332	22,874	23,418	23,997	9.3%	2,050
Zone 6	47,141	48,012	49,054	49,746	50,322	6.7%	3,181
Zone 7	10,746	11,014	11,404	11,687	11,983	11.5%	1,237
Zone 8	10,546	10,827	11,177	11,401	11,587	9.9%	1,041
Zone 9	32,245	32,657	33,152	33,500	33,763	4.7%	1,518
Zone 10	28,224	28,308	28,404	28,507	28,594	1.3%	370
Zone 11	20,934	21,114	21,225	21,319	21,469	2.6%	535
Zone 12	31,811	32,004	32,269	32,483	32,812	3.1%	1,001
Zone 13	77,310	77,411	77,892	77,920	77,772	0.6%	462
Zone 14	114,839	115,435	116,575	116,696	116,574	1.5%	1,735
Zone 15	40,434	40,756	41,247	41,569	41,797	3.4%	1,363
Zone 16	31,973	32,243	32,628	32,926	33,154	3.7%	1,181
Zone 17	50,915	51,308	51,713	51,884	51,872	1.9%	957
Zone 18	39,232	39,701	40,268	40,738	41,417	5.6%	2,185
Zone 19	88,182	88,735	89,440	90,000	90,491	2.6%	2,309
Zone 20	49,210	49,691	50,259	50,791	51,277	4.2%	2,067
Zone 21	43,115	43,420	43,808	44,330	44,877	4.1%	1,762
Zone 22	68,559	68,725	68,823	68,777	68,557	0.0%	-2
Study Area (Zones 1 - 22)	918,941	926,877	937,678	944,996	951,128	3.5%	32,187
Representative DC Area (Zones 1-12 ; 17,18)	405,319	410,461	417,006	421,987	426,629	5.3%	21,310

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2022) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2022 (incl SFT)	2022	2025	2030	2035	2040
		EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		6.3%	6.5%	7.1%	7.4%	7.7%
Zone 1	£2,450	£2,310	£2,298	£2,294	£2,298	£2,302
Zone 2	£2,592	£2,444	£2,430	£2,427	£2,431	£2,435
Zone 3	£2,727	£2,572	£2,558	£2,554	£2,559	£2,563
Zone 4	£2,917	£2,751	£2,736	£2,732	£2,737	£2,741
Zone 5	£2,597	£2,449	£2,436	£2,432	£2,436	£2,441
Zone 6	£2,721	£2,566	£2,552	£2,548	£2,552	£2,557
Zone 7	£2,916	£2,750	£2,735	£2,731	£2,736	£2,740
Zone 8	£2,980	£2,810	£2,795	£2,791	£2,796	£2,801
Zone 9	£2,850	£2,688	£2,673	£2,669	£2,674	£2,678
Zone 10	£2,733	£2,577	£2,563	£2,559	£2,564	£2,568
Zone 11	£2,826	£2,665	£2,650	£2,646	£2,651	£2,655
Zone 12	£2,714	£2,559	£2,545	£2,542	£2,546	£2,551
Zone 13	£2,558	£2,413	£2,399	£2,396	£2,400	£2,404
Zone 14	£2,534	£2,390	£2,376	£2,373	£2,377	£2,381
Zone 15	£2,628	£2,479	£2,465	£2,461	£2,466	£2,470
Zone 16	£2,748	£2,592	£2,577	£2,574	£2,578	£2,583
Zone 17	£2,774	£2,616	£2,601	£2,597	£2,602	£2,607
Zone 18	£2,794	£2,635	£2,621	£2,617	£2,621	£2,626
Zone 19	£2,632	£2,482	£2,468	£2,465	£2,469	£2,474
Zone 20	£2,639	£2,488	£2,475	£2,471	£2,475	£2,480
Zone 21	£2,871	£2,707	£2,692	£2,688	£2,693	£2,698
Zone 22	£2,978	£2,809	£2,793	£2,789	£2,794	£2,799
STUDY AREA (Zones 1-22) AVERAGE	£2,735	£2,580	£2,565	£2,562	£2,566	£2,571
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£2,757	£2,599	£2,585	£2,581	£2,586	£2,590

Source: Average spend per capita estimates (2020 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 19 published by Experian Business Strategies (January 2022).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 19 (January 2022).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2022) TO 2040 (£m)

	2022 (incl SFT)	2022	2025	2030	2035	2040
Zone 1	£34.0	£32.1	£32.2	£32.7	£33.2	£33.8
Zone 2	£129.4	£122.0	£122.4	£123.8	£125.4	£126.5
Zone 3	£38.1	£36.0	£36.5	£37.4	£38.3	£39.2
Zone 4	£98.6	£93.0	£94.4	£97.1	£99.5	£101.2
Zone 5	£57.0	£53.8	£54.4	£55.6	£57.1	£58.6
Zone 6	£128.3	£121.0	£122.5	£125.0	£127.0	£128.7
Zone 7	£31.3	£29.6	£30.1	£31.1	£32.0	£32.8
Zone 8	£31.4	£29.6	£30.3	£31.2	£31.9	£32.5
Zone 9	£91.9	£86.7	£87.3	£88.5	£89.6	£90.4
Zone 10	£77.1	£72.7	£72.6	£72.7	£73.1	£73.4
Zone 11	£59.2	£55.8	£55.9	£56.2	£56.5	£57.0
Zone 12	£86.3	£81.4	£81.5	£82.0	£82.7	£83.7
Zone 13	£197.8	£186.5	£185.7	£186.6	£187.0	£187.0
Zone 14	£291.0	£274.4	£274.3	£276.6	£277.4	£277.6
Zone 15	£106.3	£100.2	£100.5	£101.5	£102.5	£103.2
Zone 16	£87.9	£82.9	£83.1	£84.0	£84.9	£85.6
Zone 17	£141.2	£133.2	£133.5	£134.3	£135.0	£135.2
Zone 18	£109.6	£103.4	£104.0	£105.4	£106.8	£108.8
Zone 19	£232.1	£218.9	£219.0	£220.5	£222.2	£223.8
Zone 20	£129.9	£122.4	£123.0	£124.2	£125.7	£127.2
Zone 21	£123.8	£116.7	£116.9	£117.8	£119.4	£121.1
Zone 22	£204.2	£192.6	£192.0	£192.0	£192.2	£191.9
STUDY AREA (Zones 1-22)	£2,486.4	£2,344.6	£2,352.1	£2,376.2	£2,399.1	£2,419.1
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£1,113.5	£1,050.0	£1,057.6	£1,073.0	£1,087.8	£1,101.7

GROWTH 2022 to 2040:

%	2022-40
5.4%	£1.7
3.6%	£4.4
9.0%	£3.2
8.9%	£8.3
9.0%	£4.8
6.4%	£7.7
11.1%	£3.3
9.5%	£2.8
4.3%	£3.8
1.0%	£0.7
2.2%	£1.2
2.8%	£2.3
0.3%	£0.5
1.2%	£3.2
3.0%	£3.0
3.3%	£2.8
1.5%	£2.0
5.2%	£5.4
2.3%	£5.0
3.8%	£4.7
3.7%	£4.4
-0.3%	-£0.7
3.2%	£74.5
4.9%	£51.7

APPENDIX 3:

Baseline Scenario: Convenience Goods: Market Shares & Turnover (excluding SFT)

APPENDIX 4:
Baseline Scenario: Convenience Goods:
Capacity

TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)
 Excluding SFT & 'Inflow' from outside Study Area

	2022	2025	2030	2035	2040
Western Dorset Area	£220.2	£223.2	£228.7	£233.7	£238.2
Weymouth & Portland Area	£189.0	£190.2	£193.0	£196.0	£198.6
Northern Dorset Area	£209.0	£209.3	£210.4	£212.1	£213.9
Eastern Dorset	£211.3	£212.0	£213.9	£215.8	£217.6
Purbeck Area	£52.7	£53.3	£54.4	£55.2	£55.9
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:	£882.2	£888.0	£900.4	£912.7	£924.2

TABLE 2 ALL CONVENIENCE GOODS - TOTAL TURNOVER
 Including 'Inflow' from outside Study Area

	Estimated 'Inflow' from outside Study Area	2022	2025	2030	2035	2040
Western Dorset Area	5%	£231.8	£235.0	£240.8	£246.0	£250.7
Weymouth & Portland Area	5%	£199.0	£200.2	£203.2	£206.3	£209.0
Northern Dorset Area	3%	£215.5	£215.7	£217.0	£218.6	£220.6
Eastern Dorset	3%	£217.9	£218.6	£220.5	£222.4	£224.3
Purbeck Area	3%	£54.3	£55.0	£56.0	£56.9	£57.7
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:		£918.4	£924.5	£937.4	£950.2	£962.3

TABLE 3: COMMITTED CONVENIENCE GOODS FLOORSPACE

CENTRE	PLANNING REF	LOCATION	Gross Floorpace (sq m)	Net Floorpace (sq m)	2022 Average Sales Density (£ per sqm)	FORECAST TURNOVER (£M)				
						2022	2025	2030	2035	2040
[1] Bradford Abbas Parish (Out-of-Centre)	WD/D/16/000486	Land adj. Unit 4, Peel Centre, Babylon Hill, Yeovil	N/A	569	11,000	£6.3	£6.3	£6.4	£6.5	£6.6
[2] Shaftesbury (Out-of-Centre)	P/FUL/2020/00008	Former Cattle Market Christys Lane Shaftesbury Dorset SP7 8PH	2,089	348	11,000	£3.8	£3.9	£3.9	£4.0	£4.0
[3] West Parley (Out-of-Centre)	3/17/3609/OUT	Land East of New Road, West Parley, Dorset	3,200	1,408	11,000	£15.5	£15.6	£15.8	£16.1	£16.3
[4] Wimborne Minster (Out-of-Centre)	3/14/0016/OUT	East and West of Cranborne Road, Burts Hill, Wimborne.	1,400	896	11,000	£9.9	£9.9	£10.1	£10.2	£10.4
[5] Littlemoor (Out-of-Centre)	WP/16/00253/OUT	Lands to north of Littlemoor Road, Weymouth	850	544	11,000	£6.0	£6.0	£6.1	£6.2	£6.3
[6] Gillingham (Out-of-Centre)	2/2018/0036/OUT	West Of Shaftesbury Road At Land South Of Gillingham Shaftesbury Road Gillingham Dorset	760	608	11,000	£6.7	£6.7	£6.8	£6.9	£7.1
[7] Bridport (Out-of-Centre)	WD/D/17/000986	Land at Vearse Farm, Bridport	1,000	800	11,000	£8.8	£8.9	£9.0	£9.1	£9.3
TOTAL				5,173		£56.9	£57.4	£58.2	£59.1	£60.0

Notes:

- [1] WD/D/16/000486: Erection of retail warehouse unit for unrestricted A1 Non-food retail use. Total area of 1,895 sqm net of which maximum convenience goods floorpace is 569 sqm net and comparison goods floorpace is 1,326 sqm net.
- [2] P/FUL/2020/00008: Erection of retail foodstore with associated car parking, access, landscaping and engineering works. Officer's report indicates an internal sales area of 1,161sqm net. Assumed that of this floorpace 70% will be for convenience goods and 30% for comparison goods.
- [3] 3/17/3609/OUT: Outline application (All matters reserved except for access and associated link road); with up to 386 dwellings (Class C3); up to 1000sqm of retail units (Classes A1-A5); up to 900sqm of offices (Class B1) and up to 2200sqm of foodstore (Class A1); together with accesses, a link road and associated highway works, public open space including SANG, allotments, landscaping and associated works. In relation to the 2,200sqm gross foodstore (a 80% gross to net ratio has been applied and of which 80% is assumed for convenience goods and 20% for comparison goods) floorpace. Additionally based on the floorpace of 1,000 sqm gross for the retail units (a 90% gross to net ratio has been applied) and assumed for comparison goods floorpace only).
- [4] 3/14/0016/OUT - Residential development of up to 630 dwellings, a new local centre, a replacement and extended Wimborne First School, public open space and new allotments together with new access, streets and other related infrastructure (All Matters Reserved). The Council has provided a gross floorpace estimate of some 1,400sqm. This has been netted down to 1,120 sqm net assuming a gross to net ratio of 80%. It is assumed that of this net total 80% will be for convenience goods (896 sqm net) and the remainder (20%) or 224 sqm net will be for comparison goods only.
- [5] WP/16/00253/OUT - Outline application for a mixed use development comprising: up to 500 dwellings, including affordable housing; up to 8 ha of employment land (to include a new hotel, residential care home, car show rooms and other employment land); land for a new primary school; a new local centre; public open spaces, new accesses and roads, and associated infrastructure. The Council has provided a gross floorpace estimate of some 850sqm net has been netted down to 680 sqm net assuming a gross to net ratio of 80%. Of this it is assumed that 80% will be for convenience goods (544 sqm net) and the remainder (20%) or 136 sqm net will be for comparison goods only.
- [6] 2/2018/0036/OUT - Develop land by construction of an urban extension to the south of Gillingham between Shaftesbury Road (B3081) and New Road (B3092). The urban extension would comprise of up to 961 dwellings, up to 2,642 sq.m in a new local centre providing retail, community, health, and leisure uses, new and enhanced pedestrian/cycle routes, open spaces, roads, car parking and vehicular access. To include all ancillary works and associated infrastructure. (Outline application to determine access only). A1 (Convenience Retail) of 760 sqm GEA proposed. This has been netted down by 80% to 608 sqm net and for convenience goods only.
- [7] WD/D/17/000986 - Outline application for the development of up to 760 dwellings, 60 unit care home (Use Class C2), 4 hectares of land for employment (Use Classes B1, B2, B8), mixed use local centre (Use Classes A1, A2, A3, A4, A5, B1, C3 and D1), primary school and associated playing fields (Use Class D1), areas of public open space and allotments, drainage works, the formation of new vehicular accesses to West Road and the formation of new pedestrian and cycle links. Assumed retail will not exceed 1,000sqm gross and assumed for convenience goods only. This has been netted down by 80% to 800 sqm net and for convenience goods only.

TABLE 4: DORSET UNITARY AUTHORITY AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035	2040
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£918.4	£924.5	£937.4	£950.2	£962.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£918.4	£925.8	£939.7	£953.9	£968.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£1.3	-£2.3	-£3.7	-£6.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£57.4	£58.2	£59.1	£60.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-£58.7	-£60.5	-£62.8	-£66.0
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-5,291	-5,378	-5,499	-5,693
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-7,558	-7,682	-7,855	-8,133

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 2).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 3. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2025.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, Co-Op, etc.).

TABLE 5: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT (NET SQ M)
Assume Equilibrium at 2022 and Constant Market Shares

	2025	2030	2035	2040
TOTAL DORSET UNITARY AREA WIDE CONVENIENCE GOODS CAPACITY	-5,291	-5,378	-5,499	-5,693

TABLE 6: DORSET - CONVENIENCE GOODS CAPACITY ASSESSMENT BY CENTRE AND UNITARY AUTHORITY AREA (sqm net)

	2025	2030	2035	2040
Western Dorset Area				
Dorchester	23	60	91	121
Bridport	11	31	43	48
Lyme Regis	4	12	17	18
Sherborne	-0	-1	-3	-8
Beaminster	4	9	12	13
All Smaller Villages / Local Centres	11	28	40	48
All Out-of-Centre	-731	-620	-542	-491
Sub-Total	-678	-481	-342	-250
Weymouth & Portland Area				
Weymouth	-2	-3	-3	-5
Portland, Easton	-8	-8	-9	-4
Portland, Fortuneswell	-1	-1	-1	-0
All Smaller Villages / Local Centres	-1	-2	-3	-5
All Out-of-Centre	-566	-568	-565	-595
Sub-Total	-578	-583	-580	-609
Northern Dorset Area				
Blandford Forum	-19	-40	-56	-65
Gillingham	-49	-115	-166	-217
Shaftesbury	-17	-50	-76	-96
Sturminster Newton	-10	-22	-31	-41
Stalbridge	-1	-3	-6	-10
All Smaller Villages / Local Centres / All Other	-4	-8	-10	-12
All Out-of-Centre	-1,562	-1,603	-1,636	-1,658
Sub-Total	-1,661	-1,841	-1,982	-2,099
Eastern Dorset				
Ferndown	-43	-100	-163	-237
Verwood	-34	-79	-124	-181
Wimborne	-907	-921	-933	-929
West Moors	-1	-2	-4	-6
Corfe Mullen	-2	-5	-7	-7
West Parley	-1,409	-1,409	-1,410	-1,412
Other Eastern Dorset	0	0	0	0
Sub-Total	-2,396	-2,517	-2,641	-2,771
Purbeck Area				
Purbeck (District)	19	39	40	31
Wareham	1	3	3	3
Wool	1	3	3	2
Sub-Total	22	44	46	36
TOTAL DORSET UNITARY AREA WIDE CONVENIENCE GOODS CAPACITY	-5,291	-5,378	-5,499	-5,693

APPENDIX 5:

Baseline Scenario: Comparison Goods: Population and Expenditure

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2022) POPULATION & PROJECTIONS (to 2040) GROWTH 2022 to 2040:

ZONE:	2022	2025	2030	2035	2040	%	2022-40
Zone 1	13,875	14,006	14,237	14,428	14,671	5.7%	796
Zone 2	49,933	50,379	51,033	51,578	51,922	4.0%	1,989
Zone 3	13,980	14,287	14,643	14,955	15,294	9.4%	1,314
Zone 4	33,790	34,512	35,553	36,343	36,926	9.3%	3,136
Zone 5	21,947	22,332	22,874	23,418	23,997	9.3%	2,050
Zone 6	47,141	48,012	49,054	49,746	50,322	6.7%	3,181
Zone 7	10,746	11,014	11,404	11,687	11,983	11.5%	1,237
Zone 8	10,546	10,827	11,177	11,401	11,587	9.9%	1,041
Zone 9	32,245	32,657	33,152	33,500	33,763	4.7%	1,518
Zone 10	28,224	28,308	28,404	28,507	28,594	1.3%	370
Zone 11	20,934	21,114	21,225	21,319	21,469	2.6%	535
Zone 12	31,811	32,004	32,269	32,483	32,812	3.1%	1,001
Zone 13	77,310	77,411	77,892	77,920	77,772	0.6%	462
Zone 14	114,839	115,435	116,575	116,696	116,574	1.5%	1,735
Zone 15	40,434	40,756	41,247	41,569	41,797	3.4%	1,363
Zone 16	31,973	32,243	32,628	32,926	33,154	3.7%	1,181
Zone 17	50,915	51,308	51,713	51,884	51,872	1.9%	957
Zone 18	39,232	39,701	40,268	40,738	41,417	5.6%	2,185
Zone 19	88,182	88,735	89,440	90,000	90,491	2.6%	2,309
Zone 20	49,210	49,691	50,259	50,791	51,277	4.2%	2,067
Zone 21	43,115	43,420	43,808	44,330	44,877	4.1%	1,762
Zone 22	68,559	68,725	68,823	68,777	68,557	0.0%	-2
Study Area (Zones 1 - 22)	918,941	926,877	937,678	944,996	951,128	3.5%	32,187
Representative DC Area (Zones 1-12 ; 17,18)	405,319	410,461	417,006	421,987	426,629	5.3%	21,310

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2022) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED COMPARISON EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2022 (incl SFT)	2022	2025	2030	2035	2040
		EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		23.9%	26.1%	28.3%	29.5%	30.1%
Zone 1	£3,557	£2,707	£2,856	£3,187	£3,615	£4,135
Zone 2	£3,992	£3,038	£3,205	£3,577	£4,057	£4,641
Zone 3	£4,546	£3,459	£3,649	£4,073	£4,620	£5,284
Zone 4	£4,801	£3,654	£3,855	£4,302	£4,880	£5,582
Zone 5	£4,168	£3,172	£3,346	£3,734	£4,236	£4,845
Zone 6	£4,549	£3,462	£3,652	£4,076	£4,623	£5,288
Zone 7	£5,103	£3,884	£4,097	£4,572	£5,187	£5,933
Zone 8	£4,991	£3,798	£4,007	£4,472	£5,073	£5,802
Zone 9	£4,722	£3,594	£3,791	£4,231	£4,800	£5,490
Zone 10	£4,433	£3,374	£3,559	£3,972	£4,506	£5,154
Zone 11	£4,813	£3,663	£3,864	£4,312	£4,892	£5,595
Zone 12	£4,615	£3,512	£3,705	£4,135	£4,691	£5,366
Zone 13	£3,982	£3,030	£3,197	£3,568	£4,047	£4,629
Zone 14	£3,994	£3,040	£3,207	£3,579	£4,060	£4,643
Zone 15	£4,235	£3,223	£3,400	£3,795	£4,305	£4,924
Zone 16	£4,471	£3,402	£3,589	£4,006	£4,544	£5,197
Zone 17	£4,819	£3,667	£3,869	£4,318	£4,898	£5,603
Zone 18	£4,921	£3,745	£3,951	£4,409	£5,002	£5,721
Zone 19	£4,206	£3,201	£3,377	£3,769	£4,275	£4,890
Zone 20	£4,406	£3,353	£3,537	£3,948	£4,478	£5,122
Zone 21	£4,982	£3,792	£4,000	£4,464	£5,064	£5,792
Zone 22	£5,012	£3,814	£4,023	£4,490	£5,094	£5,826
STUDY AREA (Zones 1-22) AVERAGE	£4,514	£3,436	£3,624	£4,045	£4,588	£5,248
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£4,574	£3,481	£3,672	£4,098	£4,649	£5,317

Source: Average spend per capita estimates (2020 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 19 published by Experian Business Strategies (January 2022).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 19 (January 2022).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2022) TO 2040 (£m)

	2022 (incl SFT)	2022	2025	2030	2035	2040
Zone 1	£49.4	£37.6	£40.0	£45.4	£52.2	£60.7
Zone 2	£199.3	£151.7	£161.5	£182.5	£209.3	£241.0
Zone 3	£63.5	£48.4	£52.1	£59.6	£69.1	£80.8
Zone 4	£162.2	£123.5	£133.0	£153.0	£177.4	£206.1
Zone 5	£91.5	£69.6	£74.7	£85.4	£99.2	£116.3
Zone 6	£214.4	£163.2	£175.3	£199.9	£230.0	£266.1
Zone 7	£54.8	£41.7	£45.1	£52.1	£60.6	£71.1
Zone 8	£52.6	£40.1	£43.4	£50.0	£57.8	£67.2
Zone 9	£152.3	£115.9	£123.8	£140.3	£160.8	£185.4
Zone 10	£125.1	£95.2	£100.7	£112.8	£128.4	£147.4
Zone 11	£100.8	£76.7	£81.6	£91.5	£104.3	£120.1
Zone 12	£146.8	£111.7	£118.6	£133.4	£152.4	£176.1
Zone 13	£307.8	£234.2	£247.4	£277.9	£315.3	£360.0
Zone 14	£458.7	£349.1	£370.2	£417.2	£473.7	£541.3
Zone 15	£171.3	£130.3	£138.6	£156.5	£178.9	£205.8
Zone 16	£142.9	£108.8	£115.7	£130.7	£149.6	£172.3
Zone 17	£245.4	£186.7	£198.5	£223.3	£254.1	£290.6
Zone 18	£193.1	£146.9	£156.9	£177.6	£203.8	£237.0
Zone 19	£370.9	£282.3	£299.7	£337.1	£384.8	£442.5
Zone 20	£216.8	£165.0	£175.8	£198.4	£227.5	£262.7
Zone 21	£214.8	£163.5	£173.7	£195.6	£224.5	£259.9
Zone 22	£343.6	£261.5	£276.5	£309.0	£350.3	£399.4
STUDY AREA (Zones 1-22)	£4,078.1	£3,103.4	£3,302.8	£3,729.3	£4,264.0	£4,909.8
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£1,851.2	£1,408.8	£1,505.3	£1,706.9	£1,959.3	£2,265.8

GROWTH 2022 to 2040:

%	2022-40
61.5%	£23.1
58.9%	£89.3
67.1%	£32.5
66.9%	£82.7
67.0%	£46.7
63.1%	£102.9
70.4%	£29.4
67.8%	£27.2
60.0%	£69.5
54.8%	£52.2
56.7%	£43.5
57.6%	£64.3
53.7%	£125.8
55.1%	£192.2
57.9%	£75.5
58.4%	£63.5
55.6%	£103.9
61.3%	£90.0
56.8%	£160.2
59.2%	£97.7
59.0%	£96.5
52.8%	£138.0
58.2%	£1,806.3
60.8%	£857.0

APPENDIX 6:

Baseline Scenario: Comparison Goods: Market Shares & Turnover (excluding SFT)

TABLE 1: ALL COMPARISON GOODS - 2022 MARKET SHARE ANALYSIS (%)
 Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)
WITHIN DORSET UNITARY AUTHORITY AREA																								
Western Dorset Area																								
Dorchester	6.5%	10.0%	23.6%	9.0%	68.4%	9.4%	62.4%	26.2%	1.8%	0.7%	0.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	10.3%
Bridport	0.0%	0.0%	0.4%	39.4%	0.2%	0.0%	0.0%	13.1%	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%	1.7%	3.8%
Lyme Regis	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Sherborne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.9%	22.2%	0.3%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	2.0%
Beaminstere	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
All Smaller Villages / Local Centres	0.0%	0.2%	1.1%	0.6%	0.6%	0.1%	1.0%	0.5%	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%	0.1%	0.2%
All Out-of-Centre	0.0%	0.5%	2.4%	1.5%	7.3%	1.7%	5.3%	1.4%	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.1%
Western Dorset Total	6.5%	10.7%	27.6%	54.6%	76.4%	11.2%	70.3%	47.4%	24.0%	1.0%	0.4%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	17.9%
Weymouth & Portland Area																								
Weymouth	63.6%	62.4%	41.7%	0.2%	6.8%	0.9%	5.6%	1.4%	0.3%	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%	4.8%	10.5%
Portland, Easton	14.4%	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%	0.0%	0.0%	0.0%	0.2%	0.4%
Portland, Fortuneswell	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Smaller Villages / Local Centres	0.3%	2.4%	0.9%	0.0%	0.3%	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%	0.0%	0.0%	0.0%	0.1%	0.3%
All Out-of-Centre	2.1%	13.9%	14.3%	0.1%	2.5%	0.6%	4.8%	0.3%	0.0%	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%	1.1%	2.4%
Weymouth & Portland Total	81.1%	79.0%	57.0%	0.3%	9.7%	1.6%	10.4%	1.6%	0.3%	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%	6.2%	13.7%
Northern Dorset Area																								
Blandford Forum	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.8%	0.0%	1.4%	3.4%	0.8%	44.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	4.0%
Gillingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	16.4%	5.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.6%
Shaftesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	5.2%	39.4%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	2.6%
Sturminster Newton	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	2.1%	8.9%	0.3%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.9%
Stalbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	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%	0.1%	0.2%
All Smaller Villages / Local Centres	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%
Northern Dorset Total	0.0%	0.0%	0.0%	0.3%	0.2%	0.1%	0.8%	0.0%	8.5%	35.3%	46.6%	50.4%	0.0%	0.0%	0.2%	0.0%	0.0%	0.5%	0.0%	0.1%	0.9%	0.0%	4.5%	9.7%
Eastern Dorset																								
Ferndown	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.7%	0.7%	0.2%	14.4%	1.2%	0.2%	0.3%	0.3%	0.2%	1.1%	2.0%
Verwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.0%	0.4%	0.2%	1.7%	20.8%	0.3%	2.4%	3.7%	0.0%	0.3%	0.6%
Wimborne	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.0%	0.4%	0.2%	1.7%	20.8%	0.3%	2.4%	3.7%	0.0%	1.6%	2.5%
West Moors	0.0%	0.0%	0.0%	0.0%	0.0%	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%	0.1%
Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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%	0.0%	0.0%	0.0%	0.0%	0.0%
West Parley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other East Dorset	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.3%	0.0%	0.2%	1.7%	0.8%	0.9%	0.4%	1.5%	0.1%	0.6%	0.3%
Eastern Dorset Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	4.1%	1.1%	0.8%	22.6%	23.0%	1.4%	3.1%	6.0%	0.3%	3.8%	5.5%
Purbeck Area																								
Purbeck (District)	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.6%	1.3%
Swanage	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	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%	0.1%
Purbeck Area Total	0.0%	0.0%	0.0%	0.0%	0.0%	12.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.7%	1.4%
Sub-Total: Within Dorset Unitary area	87.6%	89.8%	84.5%	55.2%	86.2%	25.7%	81.5%	49.0%	32.8%	36.3%	47.2%	53.6%	1.4%	4.3%	1.3%	0.8%	22.6%	23.5%	1.4%	3.3%	6.9%	0.4%	23.3%	48.2%
OUTSIDE DORSET UNITARY AUTHORITY AREA																								
Bournemouth	1.7%	0.6%	4.2%	0.3%	1.1%	9.6%	1.8%	0.8%	1.6%	3.0%	2.7%	3.5%	79.2%	58.4%	55.3%	37.0%	53.3%	17.9%	22.3%	17.4%	31.0%	15.6%	27.2%	11.2%
Christchurch	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	1.1%	31.8%	48.9%	0.8%	0.0%	0.4%	1.2%	12.3%	13.4%	5.5%	0.1%
Poole	5.2%	4.7%	7.1%	1.4%	7.0%	53.0%	6.3%	1.4%	3.2%	16.6%	8.0%	33.6%	10.9%	32.5%	6.2%	2.1%	10.9%	51.5%	70.4%	74.6%	5.8%	2.1%	24.3%	19.0%
All Others	5.5%	4.9%	4.0%	43.2%	5.7%	11.7%	10.4%	48.8%	62.4%	44.1%	42.1%	9.4%	3.4%	3.7%	5.4%	11.2%	12.4%	7.1%	5.5%	3.5%	44.0%	68.5%	19.8%	21.5%
Sub-Total: Outside Dorset Unitary area	12.4%	10.2%	15.5%	44.8%	13.8%	74.3%	18.5%	51.0%	67.2%	63.7%	52.8%	46.4%	98.6%	95.7%	98.7%	99.2%	77.4%	76.5%	98.6%	96.7%	93.1%	99.6%	76.7%	51.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes: Market Shares derived from convenience goods market patterns (in £m) from:
 • Market Shares derived from convenience goods market patterns (in £m) from:
 • Joint Retail And Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council; and
 • Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils.

TABLE 2: 2022 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 - 22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																										
Western Dorset Area	Dorchester	£2.5	£15.2	£11.4	£11.1	£47.6	£15.3	£26.1	£10.5	£2.1	£0.6	£0.1	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£144.9	£144.9	
	Bridport	£0.0	£0.0	£0.2	£48.6	£0.1	£0.0	£0.0	£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	£54.2	£54.2	
	Lyme Regis	£0.0	£0.0	£0.0	£4.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.8	£4.8	
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8	£25.7	£0.3	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.1	£28.1	
	Beaminster	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£1.7	£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	£2.0	£2.0	
	All Smaller Villages / Local Centres	£0.0	£0.3	£0.5	£0.7	£0.4	£0.2	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9	
	All Out-of-Centre	£0.0	£0.7	£1.2	£1.9	£5.1	£2.7	£2.2	£0.5	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.8	£14.8	
	Western Dorset Total	£2.5	£16.3	£13.3	£67.4	£53.2	£18.2	£29.3	£19.0	£27.9	£1.0	£0.3	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£251.6	£251.6		
Weymouth & Portland Area	Weymouth	£23.9	£94.6	£20.2	£0.2	£4.7	£1.5	£2.3	£0.5	£0.3	£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	£148.5	£148.5	
	Portland, Easton	£5.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.8	£5.8	
	Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	
	All Smaller Villages / Local Centres	£0.1	£3.7	£0.4	£0.0	£0.2	£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	£0.0	£0.0	£0.0	£4.6	£4.6	
	All Out-of-Centre	£0.8	£21.1	£6.9	£0.1	£1.8	£1.0	£2.0	£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	£0.0	£33.9	£33.9	
	Weymouth & Portland Total	£30.5	£119.9	£27.5	£0.3	£6.7	£2.5	£4.3	£0.7	£0.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£193.0	£193.0		
Northern Dorset Area	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.3	£0.0	£1.6	£3.3	£0.6	£49.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£55.8	£55.8	
	Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£15.6	£3.9	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£22.6	£22.6	
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£5.0	£30.2	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£37.2	£37.2	
	Sturminster Newton	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£2.5	£8.4	£0.2	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.3	£13.3	
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£2.6	
	All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5	
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.8	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3	
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.4	£0.1	£0.2	£0.3	£0.0	£9.8	£33.6	£35.7	£56.4	£0.0	£0.0	£0.3	£0.0	£0.0	£0.7	£0.0	£0.2	£1.5	£0.0	£139.2	£137.3	
Eastern Dorset	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£2.4	£0.9	£0.2	£26.9	£1.8	£0.6	£0.5	£0.5	£35.6	£28.8		
	Verwood	£0.0	£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	£0.2	£7.8	£0.1	£0.0	£0.0	£0.8	£0.0	£9.4	£8.0		
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£3.5	£0.5	£0.2	£3.2	£30.6	£0.8	£4.0	£6.1	£0.0	£50.7	£34.7	
	West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1	
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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	£0.0	£0.0	£0.0	£0.1	£0.1	
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£8.0	£0.0	£0.2	£3.2	£1.2	£2.5	£0.7	£2.5	£0.3	£19.7	£4.4		
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£14.3	£1.4	£0.9	£42.2	£33.8	£3.9	£5.1	£9.8	£0.8	£116.6	£77.1	
Purbeck Area	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£18.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£19.5	£18.4	
	Swanage	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
	Wareham	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£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	£1.5	£1.5	
	Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.0	£19.9	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£21.1	£20.0	
Sub-Total: Within Dorset Unitary area		£32.9	£136.2	£40.9	£68.1	£60.03	£42.0	£34.0	£19.6	£38.0	£34.5	£36.2	£59.8	£3.3	£15.0	£1.7	£0.9	£42.2	£34.5	£3.9	£5.5	£11.3	£1.0	£721.6	£679.0	
OUTSIDE DORSET UNITARY AUTHORITY AREA																										
	Bournemouth	£0.6	£1.0	£2.0	£0.3	£0.8	£15.7	£0.7	£0.3	£1.9	£2.9	£2.1	£3.9	£185.5	£203.9	£72.1	£40.2	£99.5	£26.3	£62.9	£28.7	£50.7	£40.8	£942.8	£158.0	
	Christchurch	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.9	£3.8	£41.4	£53.2	£1.5	£0.0	£1.1	£2.0	£20.1	£35.0	£170.3	£1.6	
	Poole	£1.9	£7.2	£3.4	£1.7	£4.8	£86.5	£2.6	£0.5	£3.7	£15.8	£6.2	£37.5	£25.5	£113.4	£8.1	£2.3	£20.4	£75.7	£198.7	£123.1	£9.5	£5.5	£754.1	£268.0	
	All Others	£2.1	£7.4	£1.9	£53.3	£4.0	£19.0	£4.3	£19.5	£72.3	£42.0	£32.3	£10.5	£8.0	£12.9	£7.0	£12.2	£23.2	£10.4	£15.5	£5.8	£71.9	£179.1	£614.6	£302.2	
	Sub-Total: Outside Dorset Unitary area	£4.6	£15.5	£7.5	£55.3	£9.58	£121.2	£7.7	£20.4	£77.8	£60.7	£40.5	£51.9	£231.0	£334.0	£128.6	£107.9	£144.5	£112.4	£278.3	£159.6	£152.2	£260.4	£2,381.8	£729.8	
Total		£37.6	£151.7	£48.4	£123.5	£69.6	£163.2	£41.7	£40.1	£115.9	£95.2	£76.7	£111.7	£234.2	£349.1	£130.3	£108.8	£186.7	£146.9	£282.3	£165.0	£163.5	£261.5	£3,103.4	£1,408.8	

TABLE 3: 2025 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 - 22	Representative DC Area (Zones 1-12 ; 17,18)
WITHIN DORSET UNITARY AUTHORITY AREA																									
Western Dorset Area	Dorchester	£2.6	£16.2	£12.3	£12.0	£51.1	£16.5	£28.2	£11.3	£2.3	£0.7	£0.1	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£155.8	£155.8
	Bridport	£0.0	£0.0	£0.2	£52.4	£0.1	£0.0	£0.0	£5.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£58.4	£58.4
	Lyme Regis	£0.0	£0.0	£0.0	£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	£0.0	£0.0	£5.2	£5.2
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.8	£27.5	£0.3	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£30.0	£30.0
	Beaminstor	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£1.9	£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	£2.1	£2.1
	All Smaller Villages / Local Centres	£0.0	£0.3	£0.6	£0.8	£0.5	£0.2	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.1	£3.1
	All Out-of-Centre	£0.0	£0.8	£1.3	£2.0	£5.4	£2.9	£2.4	£0.6	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£15.9	£15.9
	Western Dorset Total	£2.6	£17.3	£14.4	£72.6	£57.1	£19.6	£31.7	£20.6	£29.8	£1.0	£0.3	£3.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£270.5	£270.5
Weymouth & Portland Area	Weymouth	£25.4	£100.7	£21.8	£0.2	£5.1	£1.6	£2.5	£0.6	£0.4	£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	£158.4	£158.4
	Portland, Easton	£5.8	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.2	£6.2
	Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3
	All Smaller Villages / Local Centres	£0.1	£3.9	£0.5	£0.0	£0.2	£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	£0.0	£0.0	£0.0	£4.9	£4.9
	All Out-of-Centre	£0.8	£22.5	£7.5	£0.1	£1.9	£1.1	£2.2	£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	£0.0	£36.2	£36.2
	Weymouth & Portland Total	£32.4	£127.6	£29.7	£0.3	£7.2	£2.7	£4.7	£0.7	£0.4	£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	£206.0	£206.0
Northern Dorset Area	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.3	£0.0	£1.7	£3.5	£0.7	£53.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£59.3	£59.3
	Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£16.5	£4.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£24.0	£24.0
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£5.2	£32.2	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£39.5	£39.5
	Sturminster Newton	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£2.6	£8.9	£0.2	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.1	£14.1
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£2.7
	All Smaller Villages / Local Centres	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.6
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.8	£2.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6	£4.6
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.5	£0.1	£0.3	£0.3	£0.0	£10.5	£35.5	£38.0	£59.8	£0.0	£0.0	£0.3	£0.0	£0.0	£0.8	£0.0	£0.2	£1.6	£0.0	£147.9	£145.8
Eastern Dorset	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£2.6	£1.0	£0.2	£28.6	£1.9	£0.6	£0.5	£0.5	£0.5	£37.8	£30.6
	Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.2	£8.3	£0.2	£0.0	£0.0	£0.9	£0.0	£10.0	£8.5
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£3.7	£0.6	£0.2	£3.4	£32.6	£0.9	£4.2	£6.4	£0.0	£54.0	£37.0
	West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£8.5	£0.0	£0.2	£3.4	£1.3	£2.7	£0.7	£2.6	£0.3	£20.9	£4.6
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.5	£15.2	£1.5	£0.9	£44.8	£36.1	£4.2	£5.5	£10.4	£0.8	£0.0	£124.0	£82.1
Purbeck Area	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£19.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£21.0	£19.8
	Wareham	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.1
	Wool	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£1.6
	Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£21.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£0.0	£22.7	£21.5
Sub-Total: Within Dorset Unitary area		£35.0	£144.9	£44.1	£73.4	£64.4	£45.1	£36.8	£21.3	£40.6	£36.5	£38.5	£63.5	£3.5	£15.9	£1.8	£0.9	£44.8	£36.9	£4.2	£5.8	£12.0	£1.1	£771.1	£725.9
OUTSIDE DORSET UNITARY AUTHORITY AREA																									
	Bournemouth	£0.7	£1.0	£2.2	£0.3	£0.8	£16.8	£0.8	£0.4	£2.0	£3.0	£2.2	£4.2	£196.0	£216.2	£76.6	£42.8	£105.8	£28.1	£66.8	£30.6	£53.8	£43.1	£894.3	£168.3
	Christchurch	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.6	£4.1	£44.1	£56.6	£1.6	£0.0	£1.2	£2.1	£21.4	£37.1	£180.8	£1.7
	Poole	£2.1	£7.6	£3.7	£1.8	£5.2	£93.0	£2.9	£0.6	£3.9	£16.8	£6.5	£39.8	£27.0	£120.3	£8.6	£2.4	£21.6	£80.8	£211.0	£131.1	£10.1	£5.8	£802.6	£286.3
	All Others	£2.2	£7.9	£2.1	£57.5	£4.3	£20.4	£4.7	£21.2	£77.2	£44.5	£34.4	£11.1	£8.4	£13.7	£7.5	£13.0	£24.6	£11.1	£16.5	£6.1	£76.4	£189.4	£654.1	£323.0
	Sub-Total: Outside Dorset Unitary area	£4.9	£16.5	£8.1	£59.6	£10.3	£130.2	£8.4	£22.1	£83.2	£64.2	£43.1	£55.1	£244.0	£354.2	£136.8	£114.8	£153.7	£120.0	£295.5	£170.0	£161.7	£275.4	£2,531.7	£779.3
Total		£40.0	£161.5	£52.1	£133.0	£74.7	£175.3	£45.1	£43.4	£123.8	£100.7	£81.6	£118.6	£247.4	£370.2	£138.6	£115.7	£198.5	£156.9	£299.7	£175.8	£173.7	£276.5	£3,302.8	£1,505.3

TABLE 4: 2030 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)
WITHIN DORSET UNITARY AUTHORITY AREA																								
Western Dorset Area																								
Dorchester	£3.0	£18.3	£14.1	£13.8	£58.4	£18.8	£32.6	£13.1	£2.6	£0.8	£0.1	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£178.2	£178.2
Bridport	£0.0	£0.0	£0.3	£60.2	£0.1	£0.0	£0.0	£6.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£67.2	£67.2
Lyme Regis	£0.0	£0.0	£0.0	£6.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.0	£6.0
Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£1.0	£31.1	£0.4	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£34.0	£34.0
Beaminster	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£2.2	£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	£2.4	£2.4
All Smaller Villages / Local Centres	£0.0	£0.4	£0.7	£0.9	£0.5	£0.2	£0.5	£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	£3.5	£3.5
All Out-of-Centre	£0.0	£0.9	£1.4	£2.3	£6.2	£3.3	£2.8	£0.7	£0.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£18.2	£18.2
Western Dorset Total	£3.0	£19.6	£16.5	£83.5	£65.3	£22.3	£36.7	£23.7	£33.7	£1.1	£0.4	£3.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£309.6	£309.6	
Weymouth & Portland Area																								
Weymouth	£28.8	£113.9	£24.9	£0.3	£5.8	£1.8	£2.9	£0.7	£0.4	£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	£179.7	£179.7
Portland, Easton	£6.5	£0.5	£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	£0.0	£7.1	£7.1
Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3
All Smaller Villages / Local Centres	£0.2	£4.4	£0.5	£0.0	£0.3	£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	£0.0	£0.0	£0.0	£5.5	£5.5
All Out-of-Centre	£0.9	£25.4	£8.6	£0.1	£2.2	£1.3	£2.5	£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	£0.0	£41.1	£41.1
Weymouth & Portland Total	£36.8	£144.3	£34.0	£0.4	£8.2	£3.1	£5.4	£0.8	£0.4	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£233.7	£233.7	
Northern Dorset Area																								
Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£1.9	£3.9	£0.8	£59.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£66.7	£66.7
Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6	£0.5	£0.0	£0.0	£3.2	£18.5	£4.6	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.9	£26.9
Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£5.9	£36.1	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£44.3	£44.3
Sturminster Newton	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£3.0	£10.0	£0.3	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£15.8	£15.8
Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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	£3.1	£3.1
All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£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	£0.6	£0.6
All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.9	£3.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.2	£5.2
Northern Dorset Total	£0.0	£0.0	£0.0	£0.5	£0.1	£0.3	£0.4	£0.0	£11.9	£39.8	£42.7	£67.3	£0.0	£0.0	£0.3	£0.0	£0.0	£0.9	£0.0	£0.2	£1.8	£0.0	£166.2	£163.9
Eastern Dorset																								
Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£2.9	£1.1	£0.3	£32.1	£2.1	£0.7	£0.6	£0.6	£0.6	£42.5	£34.4	
Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£9.4	£0.2	£0.0	£0.0	£1.0	£0.0	£11.2	£9.6	
Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£4.2	£0.6	£0.3	£3.8	£36.9	£1.0	£4.8	£7.2	£0.0	£61.1	£41.9	
West Moors	£0.0	£0.0	£0.0	£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	£1.3	£1.3	
Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	
West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£9.6	£0.0	£0.3	£3.8	£1.4	£3.0	£0.8	£2.9	£0.3	£23.5	£5.2	£5.2	
Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£17.1	£1.7	£1.0	£50.4	£40.8	£4.7	£6.2	£11.7	£0.9	£139.9	£92.6	
Purbeck Area																								
Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£22.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£23.9	£22.5	
Wareham	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
Wool	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.8	
Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.0	£24.4	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£25.8	£24.5		
Sub-Total: Within Dorset Unitary area	£39.8	£163.9	£50.4	£84.4	£73.7	£51.4	£42.5	£24.5	£46.0	£40.9	£43.2	£71.5	£3.9	£17.9	£2.0	£1.0	£50.4	£41.7	£4.7	£6.6	£13.5	£1.2	£875.2	£824.3
OUTSIDE DORSET UNITARY AUTHORITY AREA																								
Bournemouth	£0.8	£1.1	£2.5	£0.4	£0.9	£19.2	£0.9	£0.4	£2.3	£3.4	£2.4	£4.7	£220.1	£243.7	£86.6	£48.4	£119.0	£31.8	£75.2	£34.5	£60.6	£48.2	£1,007.1	£189.9
Christchurch	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.2	£4.6	£49.8	£63.9	£1.8	£0.0	£1.3	£2.4	£24.1	£41.4	£203.5	£1.9
Poole	£2.3	£8.6	£4.2	£2.1	£5.9	£106.0	£3.3	£0.7	£4.5	£18.8	£7.3	£44.8	£30.3	£135.6	£9.7	£2.7	£24.3	£91.4	£237.3	£148.0	£11.3	£6.5	£905.9	£324.4
All Others	£2.5	£8.9	£2.4	£66.1	£4.9	£23.3	£5.4	£24.4	£87.5	£49.8	£38.5	£12.5	£9.5	£15.4	£8.5	£14.6	£27.7	£12.6	£18.6	£6.9	£86.1	£211.7	£737.6	£366.4
Sub-Total: Outside Dorset Unitary area	£5.6	£18.7	£9.2	£68.5	£11.8	£148.5	£9.7	£25.5	£94.2	£71.9	£48.3	£62.0	£274.0	£399.2	£154.5	£129.7	£172.8	£135.8	£332.4	£191.9	£182.1	£307.8	£2,854.1	£882.6
Total	£45.4	£182.5	£59.6	£153.0	£85.4	£199.9	£52.1	£50.0	£140.3	£112.8	£91.5	£133.4	£277.9	£417.2	£156.5	£130.7	£223.3	£177.6	£337.1	£198.4	£195.6	£309.0	£3,729.3	£1,706.9

TABLE 5: 2035 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1-22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																									
Western Dorset Area																									
Dorchester	£3.4	£21.0	£16.3	£16.0	£67.8	£21.6	£37.8	£15.1	£2.9	£0.9	£0.1	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£206.3	£206.3	
Bridport	£0.0	£0.0	£0.3	£69.8	£0.2	£0.0	£0.0	£7.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£77.9	£77.9	
Lyme Regis	£0.0	£0.0	£0.0	£6.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.9	£6.9	
Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£1.1	£35.7	£0.4	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£39.0	£39.0	
Beaminstor	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8	£2.8	
All Smaller Villages / Local Centres	£0.0	£0.4	£0.8	£1.1	£0.6	£0.3	£0.6	£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	£4.1	£4.1	
All Out-of-Centre	£0.0	£1.0	£1.7	£2.7	£7.2	£3.8	£3.2	£0.8	£0.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£21.1	£21.1	
Western Dorset Total	£3.4	£22.4	£19.1	£96.8	£75.8	£25.7	£42.6	£27.4	£38.6	£1.3	£0.4	£4.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£358.1	£358.1		
Weymouth & Portland Area																									
Weymouth	£33.2	£130.6	£28.8	£0.3	£6.7	£2.1	£3.4	£0.8	£0.5	£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	£206.5	£206.5	
Portland, Easton	£7.5	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.1	£8.1	
Portland, Fortuneswell	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4	
All Smaller Villages / Local Centres	£0.2	£5.1	£0.6	£0.0	£0.3	£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	£0.0	£0.0	£0.0	£6.4	£6.4	
All Out-of-Centre	£1.1	£29.1	£9.9	£0.2	£2.5	£1.5	£2.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£47.3	£47.3	
Weymouth & Portland Total	£42.3	£165.4	£39.4	£0.5	£9.6	£3.6	£6.3	£0.9	£0.5	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£268.7	£268.7		
Northern Dorset Area																									
Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.5	£0.0	£2.2	£4.4	£0.9	£68.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£76.2	£76.2	
Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	£21.1	£5.3	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£30.7	£30.7	
Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£6.7	£41.1	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£50.5	£50.5	
Sturminster Newton	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£3.4	£11.4	£0.3	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£18.1	£18.1	
Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.6	£3.6	
All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.7	
All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.0	£3.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.9	£5.9	
Northern Dorset Total	£0.0	£0.0	£0.0	£0.6	£0.2	£0.3	£0.5	£0.0	£13.7	£45.3	£48.6	£76.9	£0.0	£0.0	£0.4	£0.0	£0.0	£1.0	£0.0	£0.2	£2.0	£0.0	£189.6	£189.6	
Eastern Dorset																									
Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£3.3	£1.2	£0.3	£36.6	£2.4	£0.8	£0.7	£0.7	£0.7	£48.4	£39.2	
Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.3	£10.7	£0.2	£0.0	£1.1	£0.0	£0.0	£12.8	£10.9	
Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£4.7	£0.7	£0.3	£4.3	£42.4	£1.1	£5.5	£8.3	£0.0	£70.0	£48.0	
West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£1.5	
Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	
West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£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	£10.9	£0.0	£0.3	£4.3	£1.6	£3.5	£0.9	£3.4	£0.4	£26.8	£6.0	
Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£19.4	£2.0	£1.2	£57.4	£46.9	£5.4	£7.1	£13.5	£1.0	£159.7	£105.8	
Purbeck Area																									
Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£25.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.4	£27.4	£25.9	
Wareham	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
Wool	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£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	£2.1	£2.1	
Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.0	£28.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.4	£29.7	£28.2	
Sub-Total: Within Dorset Unitary area	£45.7	£187.8	£58.4	£97.9	£85.5	£59.1	£49.4	£28.4	£52.8	£46.6	£49.2	£81.6	£4.4	£20.4	£2.3	£1.2	£57.4	£47.9	£5.4	£7.5	£15.5	£1.4	£1,005.8	£947.8	
OUTSIDE DORSET UNITARY AUTHORITY AREA																									
Bournemouth	£0.9	£1.3	£2.9	£0.5	£1.1	£22.1	£1.1	£0.5	£2.6	£3.8	£2.8	£5.4	£249.7	£276.7	£99.0	£55.3	£135.4	£36.5	£85.8	£39.6	£69.6	£54.7	£1,147.2	£216.9	
Christchurch	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£16.1	£5.2	£56.9	£73.2	£2.0	£0.0	£1.5	£2.7	£27.6	£46.9	£232.4	£2.2	
Poole	£2.7	£9.9	£4.9	£2.4	£6.9	£121.9	£3.8	£0.8	£5.1	£21.4	£8.4	£51.1	£34.4	£154.0	£11.1	£3.1	£27.7	£104.9	£270.9	£169.7	£13.0	£7.4	£1,035.5	£372.0	
All Others	£2.9	£10.2	£2.7	£76.6	£5.7	£26.8	£6.3	£28.2	£100.3	£56.7	£43.9	£14.3	£10.7	£17.5	£9.7	£16.8	£31.5	£14.4	£21.2	£7.9	£98.8	£240.0	£843.1	£420.5	
Sub-Total: Outside Dorset Unitary area	£6.5	£21.4	£10.7	£79.5	£13.7	£170.8	£11.2	£29.5	£108.0	£81.9	£70.8	£310.9	£453.4	£176.6	£148.4	£196.7	£155.9	£379.4	£219.9	£209.0	£348.9	£3,258.1	£1,011.5		
Total	£52.2	£209.3	£69.1	£177.4	£99.2	£230.0	£60.6	£57.8	£160.8	£128.4	£104.3	£152.4	£315.3	£473.7	£178.9	£149.6	£254.1	£203.8	£384.8	£227.5	£224.5	£350.3	£4,264.0	£1,959.3	

TABLE 6: 2040 SURVEY-DERIVED MARKET SHARE ANALYSIS (€m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 - 22	Representative DC Area (Zones 1-12 ; 17,18)		
WITHIN DORSET UNITARY AUTHORITY AREA																											
Western Dorset Area																											
	Dorchester	€4.0	€24.2	€19.1	€18.6	€79.5	€25.0	€44.4	€17.6	€3.4	€1.0	€0.2	€3.8	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€240.5	€240.5	
	Bridport	€0.0	€0.0	€0.4	€81.2	€0.2	€0.0	€0.0	€8.8	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€90.5	€90.5	
	Lyme Regis	€0.0	€0.0	€0.0	€8.1	€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	€0.0	€8.1	€8.1	
	Sherborne	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.1	€1.3	€41.2	€0.5	€0.2	€0.9	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€45.0	€45.0	
	Beaminstor	€0.0	€0.0	€0.0	€0.4	€0.0	€0.0	€0.0	€2.9	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€3.3	€3.3	
	All Smaller Villages / Local Centres	€0.0	€0.5	€0.9	€1.2	€0.7	€0.3	€0.7	€0.4	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€4.8	€4.8	
	All Out-of-Centre	€0.0	€1.2	€2.0	€3.2	€8.5	€4.4	€3.8	€0.9	€0.0	€0.0	€0.2	€0.5	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€24.6	€24.6	
	Western Dorset Total	€4.0	€25.8	€22.3	€112.5	€88.9	€29.7	€50.0	€31.9	€44.6	€1.5	€0.5	€5.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€416.8	€416.8	
Weymouth & Portland Area																											
	Weymouth	€38.6	€150.4	€33.7	€0.4	€7.9	€2.5	€4.0	€0.9	€0.5	€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	€0.0	€239.0	€239.0	
	Portland, Easton	€8.8	€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	€0.0	€0.0	€0.0	€0.0	€9.4	€9.4	
	Portland, Fortunesswell	€0.4	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.4	€0.4	
	All Smaller Villages / Local Centres	€0.2	€5.9	€0.7	€0.0	€0.4	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€7.3	€7.3	
	All Out-of-Centre	€1.3	€33.6	€11.6	€0.2	€2.9	€1.7	€3.4	€0.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€54.8	€54.8	
	Weymouth & Portland Total	€49.2	€190.5	€46.0	€0.5	€11.2	€4.1	€7.4	€1.1	€0.5	€0.0	€0.2	€0.3	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€311.0	€311.0	
Northern Dorset Area																											
	Blandford Forum	€0.0	€0.0	€0.0	€0.0	€0.2	€0.0	€0.5	€0.0	€2.5	€5.1	€1.0	€78.7	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€88.0	€88.0
	Gillingham	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€4.3	€24.2	€6.1	€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	€35.3	€35.3
	Shaftesbury	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.9	€7.7	€47.4	€2.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€58.2	€58.2
	Sturminster Newton	€0.0	€0.0	€0.0	€0.7	€0.0	€0.0	€0.0	€0.0	€3.9	€13.1	€0.3	€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	€20.8	€20.8
	Stalbridge	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€4.1	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€4.1	€4.1	
	All Smaller Villages / Local Centres	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.5	€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	€0.8	€0.8	
	All Out-of-Centre	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.5	€1.2	€4.1	€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	€6.8	€6.8
	Northern Dorset Total	€0.0	€0.0	€0.0	€0.7	€0.2	€0.4	€0.5	€0.0	€15.7	€52.0	€56.0	€88.8	€0.0	€0.0	€0.4	€0.0	€0.0	€1.2	€0.0	€0.3	€2.3	€0.0	€0.0	€218.5	€218.5	
Eastern Dorset																											
	Ferndown	€0.0	€0.0	€0.0	€0.0	€0.0	€0.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.8	€3.8	€1.4	€0.3	€41.8	€2.8	€0.9	€0.8	€0.8	€0.8	€0.8	€55.5	€44.9	
	Verwood	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.5	€0.0	€0.3	€12.2	€0.2	€0.0	€0.0	€1.3	€0.0	€14.6	€12.4		
	Wimborne	€0.0	€0.0	€0.0	€0.0	€0.0	€1.5	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.4	€5.4	€0.8	€0.3	€4.9	€49.3	€1.3	€6.3	€9.6	€0.4	€0.0	€81.1	€55.8	
	West Moors	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.7	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.7	€1.7	
	Corfe Mullen	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.2	€0.2	
	West Parley	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€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 East Dorset	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.8	€12.5	€0.0	€0.3	€4.9	€1.9	€4.0	€1.1	€3.9	€0.4	€0.0	€30.8	€6.8	
	Eastern Dorset Total	€0.0	€0.0	€0.0	€0.0	€0.0	€1.7	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€5.0	€22.2	€2.3	€1.4	€65.7	€54.5	€6.2	€8.2	€15.6	€1.2	€0.0	€183.9	€121.9	
Purbeck Area																											
	Purbeck (District)	€0.0	€0.0	€0.0	€0.0	€0.0	€30.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€1.1	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.3	€0.0	€0.4	€0.0	€31.7	€30.0	
	Wareham	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.2	€0.2	
	Wool	€0.0	€0.0	€0.0	€0.0	€0.0	€2.5	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€2.5	€2.5	
	Purbeck Area Total	€0.0	€0.0	€0.0	€0.0	€0.0	€32.4	€0.0	€0.0	€0.0	€0.2	€0.0	€0.0	€1.1	€0.0	€0.0	€0.0	€0.0	€0.0	€0.3	€0.0	€0.4	€0.0	€0.0	€34.4	€32.6	
Sub-Total: Within Dorset Unitary area		€53.2	€216.3	€68.3	€113.8	€100.3	€68.4	€57.9	€33.0	€60.8	€53.4	€56.7	€94.3	€5.0	€23.3	€2.7	€1.4	€65.7	€55.7	€6.2	€8.7	€17.9	€1.6	€0.0	€1,164.5	€1,097.7	
OUTSIDE DORSET UNITARY AUTHORITY AREA																											
	Bournemouth	€1.0	€1.5	€3.4	€0.5	€1.3	€25.6	€1.3	€0.5	€3.0	€4.4	€3.2	€6.2	€285.1	€316.1	€113.8	€63.7	€154.9	€42.4	€98.7	€45.7	€80.6	€62.3	€1,315.4	€249.3		
	Christchurch	€0.0	€0.0	€0.2	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€0.0	€18.4	€5.9	€65.4	€84.3	€2.3	€0.0	€1.8	€3.2	€32.0	€53.5	€0.0	€2.5	€266.9	
	Poole	€3.1	€11.4	€5.7	€2.8	€8.1	€141.1	€4.5	€0.9	€5.9	€24.5	€9.6	€59.1	€39.2	€175.9	€12.8	€3.6	€31.7	€122.0	€311.5	€196.0	€15.1	€8.4	€1,193.0	€430.5		
	All Others	€3.3	€11.7	€3.2	€89.0	€6.6	€31.0	€7.4	€32.8	€115.6	€65.0	€50.6	€16.5	€12.3	€20.0	€11.1	€19.3	€36.1	€16.8	€24.4	€9.2	€114.4	€273.6	€0.0	€485.7	€969.9	
Sub-Total: Outside Dorset Unitary area		€7.5	€24.7	€12.5	€92.4	€16.0	€197.7	€13.2	€34.3	€124.5	€93.9	€63.4	€81.8	€355.0	€518.0	€203.1	€17										

APPENDIX 7:

Baseline Scenario: Comparison Goods: Capacity

TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)
 Excluding SFT & 'Inflow' from outside Study Area

	2022	2025	2030	2035	2040
Western Dorset Area	£251.6	£270.5	£309.6	£358.1	£416.8
Weymouth & Portland Area	£193.0	£206.0	£233.7	£268.7	£311.0
Northern Dorset Area	£139.2	£147.9	£166.2	£189.6	£218.5
Eastern Dorset	£116.6	£124.0	£139.9	£159.7	£183.9
Purbeck Area	£21.1	£22.7	£25.8	£29.7	£34.4
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:	£721.6	£771.1	£875.2	£1,005.8	£1,164.5

TABLE 2: ALL COMPARISON GOODS - TOTAL TURNOVER
 Including 'Inflow' from outside Study Area

	Estimated 'Inflow' from outside Study Area	2022	2025	2030	2035	2040
Western Dorset Area	5%	£264.9	£284.7	£325.9	£376.9	£438.7
Weymouth & Portland Area	5%	£203.2	£216.9	£246.0	£282.8	£327.3
Northern Dorset Area	5%	£146.6	£155.6	£174.9	£199.6	£230.0
Eastern Dorset	5%	£122.7	£130.6	£147.2	£168.1	£193.6
Purbeck Area	3%	£21.8	£23.4	£26.6	£30.6	£35.4
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:		£759.1	£811.2	£920.7	£1,058.1	£1,225.0

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE

CENTRE	PLANNING REF	LOCATION	Gross Floorspace (sq m)	Net Floorspace (sq m)	2022 Average Sales Density (£ per sqm)	FORECAST TURNOVER (£M)				
						2021	2025	2030	2035	2040
[1] Bradford Abbas Parish (Out-of-Centre)	WD/D/16/000486	Land adj. Unit 4, Peel Centre, Babylon Hill, Yeovil	N/A	1,326	6,500	£8.6	£9.2	£10.5	£12.1	£14.0
[2] Bradford Abbas Parish (Out-of-Centre)	WD/D/16/001406	Peel Centre Retail Park, Babylon Hill, Yeovil	207	145	6,500	£0.9	£1.0	£1.1	£1.3	£1.5
[3] Shaftesbury (Out-of-Centre)	P/FUL/2020/00008	Former Cattle Market Christys Lane Shaftesbury Dorset SP7 8PH	2,089	813	6,500	£5.3	£5.7	£6.4	£7.4	£8.6
[4] Blandford Forum (Out-of-Centre)	P/FUL/2021/00110	Unit 2 Glenmore Business Park, Shaftesbury Lane, Blandford Forum, DT11 7FP	333	266	6,500	£1.7	£1.9	£2.1	£2.4	£2.8
[5] Wimborne (Out-of-Centre)	3/21/0013/FUL	Jades Farm, Furzehill, Colehill, Wimborne, BH21 4HB	809	647	6,500	£4.2	£4.5	£5.1	£5.9	£6.8
[6] West Parley (Out-of-Centre)	3/17/3609/OUT	Land East of New Road, West Parley, Dorset	3,200	1,252	6,500	£8.1	£8.7	£9.9	£11.4	£13.2
[7] Wimborne Minster (Out-of-Centre)	3/14/0016/OUT	East and West of Cranborne Road, Burts Hill, Wimborne.	1,400	224	6,500	£1.5	£1.6	£1.8	£2.0	£2.4
[8] Littlemore (Out-of-Centre)	WP/16/00253/OUT	Lands to north of Littlemoor Road, Weymouth	850	136	6,500	£0.9	£0.9	£1.1	£1.2	£1.4
TOTAL				4,809		£31.3	£33.5	£38.1	£43.9	£50.7

Notes:

- [1] WD/D/16/000486: Erection of retail warehouse unit for unrestricted A1 Non-food retail use. Total area of 1,895 sqm net of which maximum convenience goods floorspace is 569 sqm net and comparison goods floorspace is 1,326 sqm net.
- [2] WD/D/16/001406: Erection of an ancillary pod building inc. 2 no. A1/ A3/ A5 use units. Gross floor area of 207 sqm with assumed gross to net floorspace ratio of 70%. Assumed that net floorspace of 145 sqm will be for comparison goods only.
- [3] P/FUL/2020/00008: Erection of retail foodstore with associated car parking, access, landscaping and engineering works. Officers report indicates an internal sales area of 1,161sqm net. Assumed that of this floorspace 70% will be for convenience goods and 30% for comparison goods.
- [4] P/FUL/2021/00110: Enclosure of the existing retail yard to provide a Class E/B8 unit and insertion of roller shutter doors into the front elevation. The application is for the enclosure of the existing retail yard to provide a Class E/B8 unit comprising 333 sqm (assumed gross). The existing retail yard and adjacent retail unit are currently occupied by ScrewFix, and the additional internal floorspace is proposed to be occupied by ScrewFix. This has been netted down by 80% to 266 sqm net and for comparison goods only.
- [5] 3/21/0013/FUL: Change of use from greenhouse to retail unit and erect an entrance porch to the western elevation. The gross floorspace of some 809sqm net has been netted down to 647 sqm net assuming a gross to net ratio of 80%. It is assumed that this will be for comparison goods only i.e. gardening.
- [6] 3/17/3609/OUT: Outline application (All matters reserved except for access and associated link road); with up to 386 dwellings (Class C3); up to 1000sqm of retail units (Classes A1-A5); up to 900sqm of offices (Class B1) and up to 2200sqm of foodstore (Class A1) together with accesses, a link road and associated highway works, public open space including SANG, allotments, landscaping and associated works. In relation to the 2,200sqm gross foodstore (a 80% gross to net ratio has been applied and of which 80% is assumed for convenience goods and 20% for comparison goods) floorspace. Additionally based on the floorspace of 1,000 sqm gross for the retail units (a 90% gross to net ratio has been applied) and assumed for comparison goods floorspace only).
- [7] 3/14/0016/OUT - Residential development of up to 630 dwellings, a new local centre, a replacement and extended Wimborne First School, public open space and new allotments together with new access, streets and other related infrastructure (All Matters Reserved). The Council has provided a gross floorspace estimate of some 1,400sqm. This has been netted down to 1,120 sqm net assuming a gross to net ratio of 80%. It is assumed that of this net total 80% will be for convenience goods (896 sqm net) and the remainder (20%) or 224 sqm net will be for comparison goods only.
- [8] WP/16/00253/OUT - Outline application for a mixed use development comprising: up to 500 dwellings, including affordable housing; up to 8 ha of employment land (to include a new hotel, residential care home, car show rooms and other employment land); land for a new primary school; a new local centre; public open spaces, new accesses and roads, and associated infrastructure. The Council has provided a gross floorspace estimate of some 850sqm net has been netted down to 680 sqm net assuming a gross to net ratio of 80%. Of this it is assumed that 80% will be for convenience goods (544 sqm net) and the remainder (20%) or 136 sqm net will be for comparison goods only.

TABLE 4: DORSET UNITARY AUTHORITY AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035	2040
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£759.1	£811.2	£920.7	£1,058.1	£1,225.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£759.1	£813.5	£924.9	£1,067.0	£1,230.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£2.3	-£4.2	-£8.9	-£5.9
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£33.5	£38.1	£43.9	£50.7
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-£35.8	-£42.3	-£52.8	-£56.6
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,500	£6,966	£7,919	£9,136	£10,540
	(ii) Net Floorspace Capacity (sq m):	-	-5,138	-5,338	-5,780	-5,370
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-7,340	-7,626	-8,257	-7,672

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 2).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 3. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2025.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: SUMMARY TABLE - COMPARISON GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at 2022 and Constant Market Shares

	2025	2030	2035	2040
TOTAL DORSET UNITARY AREA WIDE COMPARISON GOODS CAPACITY	-5,138	-5,338	-5,780	-5,370

TABLE 6: DORSET - COMPARISON GOODS CAPACITY ASSESSMENT BY CENTRE AND UNITARY AUTHORITY AREA (sqm net)

	2025	2030	2035	2040
Western Dorset Area				
Dorchester	71	224	300	556
Bridport	52	153	197	264
Lyme Regis	4	13	17	23
Sherborne	-12	-25	-52	-52
Beaminster	3	7	8	11
All Smaller Villages / Local Centres	2	6	7	12
All Out-of-Centre	8	24	33	59
Sub-Total	130	403	511	873
Weymouth & Portland Area				
Weymouth	-102	-163	-250	-180
Portland, Easton	-6	-8	-12	-5
Portland, Fortuneswell	-0	-0	-0	-0
All Smaller Villages / Local Centres	-4	-7	-10	-10
All Out-of-Centre	-149	-154	-166	-145
Sub-Total	-261	-332	-439	-339
Northern Dorset Area				
Blandford Forum	-85	-176	-266	-256
Gillingham	-38	-86	-130	-144
Shaftesbury	-47	-126	-199	-210
Sturminster Newton	-21	-45	-68	-75
Stalbridge	-1	-3	-5	-6
All Smaller Villages / Local Centres / All Other	-4	-8	-12	-10
All Out-of-Centre	-2,557	-2,565	-2,573	-2,573
Sub-Total	-2,754	-3,010	-3,253	-3,274
Eastern Dorset				
Ferndown	-47	-105	-178	-219
Verwood	-12	-28	-46	-57
Wimborne	-45	-94	-150	-118
West Moors	-1	-3	-6	-7
Corfe Mullen	-0	-0	-0	-0
West Parley	0	0	0	0
Other Eastern Dorset	-2,153	-2,182	-2,221	-2,238
Sub-Total	-2,259	-2,412	-2,601	-2,639
Purbeck Area				
Purbeck (District)	6	13	2	9
Swanage	0	0	-1	-1
Wareham	1	1	1	1
Sub-Total	6	14	2	10
TOTAL DORSET UNITARY AREA WIDE COMPARISON GOODS CAPACITY	-5,138	-5,338	-5,780	-5,370

APPENDIX 8:
Composite Scenario: Convenience Goods:
Population and Expenditure

TABLE 1A: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2022) POPULATION & PROJECTIONS (to 2040) **GROWTH 2022 to 2040:**

ZONE:	2022	2025	2030	2035	2040	%	2022-40
Zone 1	13,875	14,006	14,237	14,428	14,671	5.7%	796
Zone 2	49,933	50,379	51,033	51,578	51,922	4.0%	1,989
Zone 3	13,980	14,287	14,643	14,955	15,294	9.4%	1,314
Zone 4	33,790	34,512	35,553	36,343	36,926	9.3%	3,136
Zone 5	21,947	22,332	22,874	23,418	23,997	9.3%	2,050
Zone 6	47,141	48,012	49,054	49,746	50,322	6.7%	3,181
Zone 7	10,746	11,014	11,404	11,687	11,983	11.5%	1,237
Zone 8	10,546	10,827	11,177	11,401	11,587	9.9%	1,041
Zone 9	32,245	32,657	33,152	33,500	33,763	4.7%	1,518
Zone 10	28,224	28,308	28,404	28,507	28,594	1.3%	370
Zone 11	20,934	21,114	21,225	21,319	21,469	2.6%	535
Zone 12	31,811	32,004	32,269	32,483	32,812	3.1%	1,001
Zone 13	77,310	77,411	77,892	77,920	77,772	0.6%	462
Zone 14	114,839	115,435	116,575	116,696	116,574	1.5%	1,735
Zone 15	40,434	40,756	41,247	41,569	41,797	3.4%	1,363
Zone 16	31,973	32,243	32,628	32,926	33,154	3.7%	1,181
Zone 17	50,915	51,308	51,713	51,884	51,872	1.9%	957
Zone 18	39,232	39,701	40,268	40,738	41,417	5.6%	2,185
Zone 19	88,182	88,735	89,440	90,000	90,491	2.6%	2,309
Zone 20	49,210	49,691	50,259	50,791	51,277	4.2%	2,067
Zone 21	43,115	43,420	43,808	44,330	44,877	4.1%	1,762
Zone 22	68,559	68,725	68,823	68,777	68,557	0.0%	-2
Study Area (Zones 1 - 22)	918,941	926,877	937,678	944,996	951,128	3.5%	32,187
Representative DC Area (Zones 1-12 ; 17,18)	405,319	410,461	417,006	421,987	426,629	5.3%	21,310

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2022) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 1B: DORSET COUNCIL HOUSING ALLOCATIONS - PROJECTED ADDITIONAL INCREASE IN POPULATION

ZONE:		2025	2030	2035	2040	Increase
Zone 1	Zone Within District Boundary	1,034	1,183	206	206	2,730
Zone 2	Zone Within District Boundary	2,920	4,851	1,506	722	9,998
Zone 3	Zone Within District Boundary	1,643	1,285	504	58	3,490
Zone 4	Zone Extends Beyond District Boundary	1,391	2,434	862	416	5,104
Zone 5	Zone Within District Boundary	2,405	1,060	2,336	2,626	8,427
Zone 6	Zone Within District Boundary	3,870	3,381	1,963	2,246	11,460
Zone 7	Zone Within District Boundary	1,063	98	205	0	1,366
Zone 8	Zone Within District Boundary	618	285	137	384	1,424
Zone 9	Zone Extends Beyond District Boundary	1,709	946	2,003	2,144	6,802
Zone 10	Zone Extends Beyond District Boundary	2,920	3,311	1,746	573	8,550
Zone 11	Zone Predominantly Outside District Boundary	1,152	687	99	99	2,038
Zone 12	Zone Within District Boundary	2,234	2,363	999	1,489	7,085
Zone 13	Zone Outside District Boundary	0	0	0	0	0
Zone 14	Zone Outside District Boundary	0	0	0	0	0
Zone 15	Zone Outside District Boundary	0	0	0	0	0
Zone 16	Zone Outside District Boundary	0	0	0	0	0
Zone 17	Zone Extends Beyond District Boundary	1,674	1,354	1,030	1,760	5,818
Zone 18	Zone Extends Beyond District Boundary	4,006	1,377	964	1,853	8,201
Zone 19	Zone Outside District Boundary	0	0	0	0	0
Zone 20	Zone Predominantly Outside District Boundary	121	59	22	54	256
Zone 21	Zone Predominantly Outside District Boundary	570	379	74	74	1,098
Zone 22	Zone Outside District Boundary	0	0	0	0	0
Study Area (Zones 1 - 22)		29,331	25,052	14,657	14,705	14,705
Representative DC Area (Zones 1-12 ; 17,18)		28,640	24,614	14,561	14,577	14,577

Source: Dorset Council 2018 ward based mid-year projections for each ward within the Council area

TABLE 1C: REVISED COMPOSITE POPULATION & PROJECTIONS (to 2040)

GROWTH 2022 to 2040:

ZONE:	2022	2025	2030	2035	2040	%	2022-40
Zone 1	13,875	15,040	15,420	14,634	14,877	7.2%	1,002
Zone 2	49,933	53,299	55,884	53,084	52,644	5.4%	2,711
Zone 3	13,980	15,930	15,928	15,459	15,352	9.8%	1,372
Zone 4	33,790	35,903	37,987	37,205	37,342	10.5%	3,552
Zone 5	21,947	24,737	23,934	25,754	26,623	21.3%	4,676
Zone 6	47,141	51,882	52,435	51,709	52,568	11.5%	5,427
Zone 7	10,746	12,077	11,502	11,892	11,983	11.5%	1,237
Zone 8	10,546	11,445	11,462	11,538	11,971	13.5%	1,425
Zone 9	32,245	34,366	34,098	35,503	35,907	11.4%	3,662
Zone 10	28,224	31,228	31,715	30,253	29,167	3.3%	943
Zone 11	20,934	22,266	21,912	21,418	21,568	3.0%	634
Zone 12	31,811	34,238	34,632	33,482	34,301	7.8%	2,490
Zone 13	77,310	77,411	77,892	77,920	77,772	0.6%	462
Zone 14	114,839	115,435	116,575	116,696	116,574	1.5%	1,735
Zone 15	40,434	40,756	41,247	41,569	41,797	3.4%	1,363
Zone 16	31,973	32,243	32,628	32,926	33,154	3.7%	1,181
Zone 17	50,915	52,982	53,067	52,914	53,632	5.3%	2,717
Zone 18	39,232	43,707	41,645	41,702	43,270	10.3%	4,038
Zone 19	88,182	88,735	89,440	90,000	90,491	2.6%	2,309
Zone 20	49,210	49,812	50,318	50,813	51,331	4.3%	2,121
Zone 21	43,115	43,990	44,187	44,404	44,951	4.3%	1,836
Zone 22	68,559	68,725	68,823	68,777	68,557	0.0%	-2
Study Area (Zones 1 - 22)	918,941	956,208	962,730	959,653	965,833	5.1%	46,892
Representative DC Area (Zones 1-12 ; 17,18)	405,319	439,101	441,620	436,548	441,206	8.9%	35,887

Source / Notes: Dorset Council 2018 ward based mid-year projections for each ward within the Council area. These policy-led projections take into account forecast housing allocated growth. It should be noted that for Zones that are not covered by the Council data the Experian projections from Table 1 have been used. Additionally where the ward data extends outside the Council area the data has been combined with that derived from Experian. Finally, the base 2022 data is as derived from Experian at Table 1.

TABLE 2: REVISED CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2022	2025	2030	2035	2040	
	2022 (incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):	6.3%	6.5%	7.1%	7.4%	7.7%	
Zone 1	£2,450	£2,310	£2,298	£2,294	£2,298	£2,302
Zone 2	£2,592	£2,444	£2,430	£2,427	£2,431	£2,435
Zone 3	£2,727	£2,572	£2,558	£2,554	£2,559	£2,563
Zone 4	£2,917	£2,751	£2,736	£2,732	£2,737	£2,741
Zone 5	£2,597	£2,449	£2,436	£2,432	£2,436	£2,441
Zone 6	£2,721	£2,566	£2,552	£2,548	£2,552	£2,557
Zone 7	£2,916	£2,750	£2,735	£2,731	£2,736	£2,740
Zone 8	£2,980	£2,810	£2,795	£2,791	£2,796	£2,801
Zone 9	£2,850	£2,688	£2,673	£2,669	£2,674	£2,678
Zone 10	£2,733	£2,577	£2,563	£2,559	£2,564	£2,568
Zone 11	£2,826	£2,665	£2,650	£2,646	£2,651	£2,655
Zone 12	£2,714	£2,559	£2,545	£2,542	£2,546	£2,551
Zone 13	£2,558	£2,413	£2,399	£2,396	£2,400	£2,404
Zone 14	£2,534	£2,390	£2,376	£2,373	£2,377	£2,381
Zone 15	£2,628	£2,479	£2,465	£2,461	£2,466	£2,470
Zone 16	£2,748	£2,592	£2,577	£2,574	£2,578	£2,583
Zone 17	£2,774	£2,616	£2,601	£2,597	£2,602	£2,607
Zone 18	£2,794	£2,635	£2,621	£2,617	£2,621	£2,626
Zone 19	£2,632	£2,482	£2,468	£2,465	£2,469	£2,474
Zone 20	£2,639	£2,488	£2,475	£2,471	£2,475	£2,480
Zone 21	£2,871	£2,707	£2,692	£2,688	£2,693	£2,698
Zone 22	£2,978	£2,809	£2,793	£2,789	£2,794	£2,799
STUDY AREA (Zones 1-22) AVERAGE	£2,735	£2,580	£2,565	£2,562	£2,566	£2,571
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£2,757	£2,599	£2,585	£2,581	£2,586	£2,590

Source: Average spend per capita estimates (2020 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 19 published by Experian Business Strategies (January 2022).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 19 (January 2022).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2022) TO 2040 (£m)

	2022 (incl SFT)	2022	2025	2030	2035	2040	GROWTH 2022 to 2040:	
							%	2022-40
Zone 1	£34.0	£32.1	£34.6	£35.4	£33.6	£34.3	6.9%	£2.2
Zone 2	£129.4	£122.0	£129.5	£135.6	£129.1	£128.2	5.1%	£6.2
Zone 3	£38.1	£36.0	£40.7	£40.7	£39.6	£39.3	9.4%	£3.4
Zone 4	£98.6	£93.0	£98.2	£103.8	£101.8	£102.4	10.1%	£9.4
Zone 5	£57.0	£53.8	£60.3	£58.2	£62.7	£65.0	20.9%	£11.2
Zone 6	£128.3	£121.0	£132.4	£133.6	£132.0	£134.4	11.1%	£13.5
Zone 7	£31.3	£29.6	£33.0	£31.4	£32.5	£32.8	11.1%	£3.3
Zone 8	£31.4	£29.6	£32.0	£32.0	£32.3	£33.5	13.1%	£3.9
Zone 9	£91.9	£86.7	£91.9	£91.0	£94.9	£96.2	11.0%	£9.5
Zone 10	£77.1	£72.7	£80.0	£81.2	£77.6	£74.9	3.0%	£2.2
Zone 11	£59.2	£55.8	£59.0	£58.0	£56.8	£57.3	2.7%	£1.5
Zone 12	£86.3	£81.4	£87.1	£88.0	£85.3	£87.5	7.5%	£6.1
Zone 13	£197.8	£186.5	£185.7	£186.6	£187.0	£187.0	0.3%	£0.5
Zone 14	£291.0	£274.4	£274.3	£276.6	£277.4	£277.6	1.2%	£3.2
Zone 15	£106.3	£100.2	£100.5	£101.5	£102.5	£103.2	3.0%	£3.0
Zone 16	£87.9	£82.9	£83.1	£84.0	£84.9	£85.6	3.3%	£2.8
Zone 17	£141.2	£133.2	£137.8	£137.8	£137.7	£139.8	5.0%	£6.6
Zone 18	£109.6	£103.4	£114.5	£109.0	£109.3	£113.6	9.9%	£10.2
Zone 19	£232.1	£218.9	£219.0	£220.5	£222.2	£223.8	2.3%	£5.0
Zone 20	£129.9	£122.4	£123.3	£124.3	£125.8	£127.3	4.0%	£4.8
Zone 21	£123.8	£116.7	£118.4	£118.8	£119.6	£121.3	3.9%	£4.6
Zone 22	£204.2	£192.6	£192.0	£192.0	£192.2	£191.9	-0.3%	-£0.7
STUDY AREA (Zones 1-22)	£2,486.4	£2,344.6	£2,427.4	£2,439.9	£2,436.7	£2,456.9	4.8%	£112.3
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£1,113.5	£1,050.0	£1,131.1	£1,135.7	£1,125.1	£1,139.2	8.5%	£89.2

APPENDIX 9:

Composite Scenario: Convenience Goods: Market Shares & Turnover (excluding SFT)

TABLE 1: ALL CONVENIENCE GOODS - 2022 MARKET SHARE ANALYSIS (%)
 Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1-22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																									
Western Dorset Area																									
	Dorchester	0.4%	1.7%	9.4%	1.1%	30.6%	2.9%	28.8%	10.2%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	3.7%
	Bridport	0.0%	0.0%	0.6%	15.0%	0.0%	0.0%	0.0%	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%	0.6%	1.4%
	Lyme Regis	0.0%	0.0%	0.0%	6.3%	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%	0.2%	0.6%	
	Sherborne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.2%	11.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.0%	
	Beaminstor	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	2.0%	0.0%	10.2%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%	
	All Smaller Villages / Local Centres	0.0%	0.7%	4.7%	3.8%	5.2%	2.6%	9.6%	6.3%	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%	0.7%	1.6%	
	All Out-of-Centre	0.0%	1.5%	11.6%	38.6%	51.5%	8.9%	51.9%	37.5%	19.9%	1.4%	0.8%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	12.3%	
	Western Dorset Total	0.4%	3.9%	26.4%	65.5%	87.3%	14.3%	91.2%	68.0%	31.9%	1.6%	0.8%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.4%	21.0%	
Weymouth & Portland Area																									
	Weymouth	5.8%	6.8%	5.7%	0.0%	0.5%	0.1%	0.4%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.2%
	Portland, Easton	56.4%	2.1%	1.3%	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%	0.9%	2.0%
	Portland, Fortuneswell	7.7%	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%	0.0%	0.1%	0.2%	
	All Smaller Villages / Local Centres	0.8%	3.2%	1.3%	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%	0.2%	0.4%	
	All Out-of-Centre	27.4%	83.8%	64.8%	1.4%	10.7%	2.5%	8.5%	3.5%	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%	6.3%	14.1%	
	Weymouth & Portland Area Total	98.1%	96.0%	73.0%	1.4%	11.1%	2.6%	8.8%	4.3%	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%	8.1%	18.0%	
Northern Dorset Area																									
	Blandford Forum	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	1.9%	1.7%	30.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	2.6%	
	Gillingham	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	11.6%	55.2%	25.8%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	6.5%	
	Shaftesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	5.4%	46.9%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	3.2%	
	Sturminster Newton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	12.6%	0.4%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.1%	
	Stalbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.8%	
	All Smaller Villages / Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.5%	0.4%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	
	All Out-of-Centre	0.0%	0.0%	0.0%	0.4%	0.0%	0.9%	0.0%	0.0%	1.4%	12.9%	3.8%	47.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	5.0%	
	Northern Dorset Total	0.0%	0.0%	0.0%	0.7%	0.0%	0.9%	0.0%	0.0%	27.7%	89.3%	79.0%	85.3%	0.0%	0.1%	0.0%	0.0%	0.0%	1.7%	0.1%	0.3%	1.8%	8.9%	19.6%	
Eastern Dorset																									
	Ferndown	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	2.4%	1.0%	42.1%	16.0%	0.0%	0.5%	5.0%	0.0%	3.7%	6.9%	
	Verwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.1%	0.0%	0.2%	30.9%	2.5%	0.9%	0.0%	9.6%	0.0%	2.6%	4.2%	
	Wimborne	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	1.0%	36.4%	0.5%	5.9%	0.6%	0.0%	2.2%	3.9%	
	West Moors	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	
	Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.0%	0.0%	2.8%	0.0%	0.0%	0.4%	0.5%	
	West Parley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	
	Other East Dorset	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Eastern Dorset Total	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	4.2%	0.0%	1.2%	76.2%	59.9%	1.4%	9.2%	15.2%	0.0%	9.0%	15.7%	
Purbeck Area																									
	Purbeck (District)	0.0%	0.0%	0.0%	0.0%	0.0%	37.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.2%	0.0%	0.2%	2.0%	4.4%	
	Wareham	0.0%	0.0%	0.0%	0.0%	0.5%	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%	0.1%	0.3%	
	Wool	0.0%	0.0%	0.0%	0.0%	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%	0.1%	0.3%	
	Purbeck Area Total	0.0%	0.0%	0.0%	0.0%	0.5%	41.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.2%	0.0%	0.2%	2.2%	5.0%	
Sub-Total: Within Dorset Unitary area		98.5%	99.9%	99.4%	67.6%	98.9%	61.1%	100.0%	72.3%	59.6%	90.9%	79.8%	90.7%	0.8%	4.3%	0.0%	1.2%	77.2%	61.6%	1.5%	9.7%	17.0%	0.2%	37.6%	79.3%
OUTSIDE DORSET UNITARY AUTHORITY AREA																									
	Bournemouth	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	92.0%	57.7%	50.8%	5.8%	4.7%	2.0%	6.7%	3.8%	14.9%	1.8%	18.6%	1.0%	
	Christchurch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%	1.0%	47.7%	88.0%	0.4%	0.0%	0.0%	7.4%	10.9%	7.0%	0.1%	0.1%	
	Poole	0.0%	0.0%	0.0%	0.0%	0.5%	26.0%	0.0%	0.4%	0.0%	0.0%	0.0%	3.5%	1.7%	35.5%	1.0%	0.0%	2.3%	31.8%	91.7%	83.9%	1.7%	20.5%	6.7%	
	All Others	1.5%	0.1%	0.6%	32.4%	0.7%	10.7%	0.0%	27.3%	40.4%	9.1%	20.2%	5.8%	0.3%	1.5%	0.5%	5.0%	15.4%	4.6%	0.1%	2.6%	59.0%	16.3%	12.9%	
Sub-Total: Outside Dorset Unitary area		1.5%	0.1%	0.6%	32.4%	1.1%	38.9%	0.0%	27.7%	40.4%	9.1%	20.2%	9.3%	99.2%	95.7%	100.0%	98.8%	22.8%	38.4%	98.5%	90.3%	83.0%	99.8%	62.4%	20.7%
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes: Market Shares derived from convenience goods market patterns (in £m) from:
 • Joint Retail And Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council; and
 • Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils.

TABLE 2: 2022 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)		
WITHIN DORSET UNITARY AUTHORITY AREA																											
Western Dorset Area																											
	Dorchester	£0.1	£2.1	£3.4	£1.0	£16.5	£3.5	£8.5	£3.0	£0.0	£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	£0.0	£38.4	£38.4	
	Bridport	£0.0	£0.0	£0.2	£13.9	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£15.0	£15.0	
	Lyme Regis	£0.0	£0.0	£0.0	£5.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.8	£5.8	
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3	£10.2	£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	£10.7	£10.7	
	Beaminstor	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£3.0	£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	£3.8	£3.8	
	All Smaller Villages / Local Centres	£0.0	£0.8	£1.7	£3.5	£2.8	£3.1	£2.8	£1.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£16.9	£16.9	
	All Out-of-Centre	£0.0	£1.9	£4.2	£35.9	£27.7	£10.7	£15.3	£11.1	£17.2	£1.0	£0.5	£4.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£129.6	£129.6	
	Western Dorset Total	£0.1	£4.8	£9.5	£60.9	£46.9	£17.3	£26.9	£20.1	£27.6	£1.1	£0.5	£4.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£220.2	£220.2		
Weymouth & Portland Area																											
	Weymouth	£1.9	£8.4	£2.0	£0.0	£0.2	£0.1	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.9	£12.9	
	Portland, Easton	£18.1	£2.6	£0.5	£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	£0.0	£21.1	£21.1	
	Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5	£2.5	
	All Smaller Villages / Local Centres	£0.2	£3.9	£0.5	£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	£0.0	£4.6	£4.6	
	All Out-of-Centre	£8.8	£102.3	£23.3	£1.3	£5.7	£3.0	£2.5	£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	£147.9	£147.9	
	Weymouth & Portland Area Total	£31.4	£117.2	£26.2	£1.3	£6.0	£3.1	£2.6	£1.3	£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	£189.0	£189.0		
Northern Dorset Area																											
	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£1.4	£0.9	£24.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.8	£26.8
	Gillingham	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£10.0	£40.1	£14.4	£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	£68.0	£68.0
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5	£3.9	£26.1	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£33.7	£33.7
	Sturminster Newton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£9.1	£0.2	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.0	£12.0
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.8	£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	£8.4	£8.4
	All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.3	£0.2	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.3	£0.0	£1.0	£0.0	£0.0	£1.2	£9.4	£2.1	£38.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£52.4	£52.4
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.7	£0.0	£1.1	£0.0	£0.0	£24.0	£65.0	£44.0	£69.4	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£1.8	£0.2	£0.4	£2.1	£0.0	£209.0	£206.1	
Eastern Dorset																											
	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£6.6	£0.0	£0.8	£56.1	£16.5	£0.0	£0.6	£5.8	£0.0			£87.6	£73.0	
	Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£3.0	£0.0	£0.2	£41.2	£2.6	£2.0	£0.0	£11.2	£0.0			£60.8	£43.7	
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£1.3	£37.6	£1.1	£7.2	£0.7	£0.0			£51.4	£40.5	
	West Moors	£0.0	£0.0	£0.0	£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			£1.6	£1.6	
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£5.2	£0.0	£3.4	£0.0	£0.0			£8.9	£5.4	
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0			£1.1	£1.1	
	Other East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0			£0.0	£0.0	
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£11.5	£0.0	£10.5	£61.9	£3.1	£11.3	£17.7	£0.0			£211.3	£165.3	
Purbeck Area																											
	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£44.9	£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	£0.3	£0.0	£0.4			£46.8	£46.2
	Wareham	£0.0	£0.0	£0.0	£0.0	£0.2	£2.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0			£3.0	£3.0
	Wool	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0			£2.8	£2.8
	Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.2	£50.4	£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	£0.3	£0.0	£0.4			£52.7	£52.0
Sub-Total: Within Dorset Unitary area		£31.6	£121.9	£35.7	£62.8	£53.1	£73.9	£29.6	£21.4	£51.6	£66.1	£44.5	£73.8	£1.5	£11.8	£0.0	£10.8	£63.7	£3.3	£11.9	£19.8	£0.4			£882.2	£832.5	
OUTSIDE DORSET UNITARY AUTHORITY AREA																											
	Bournemouth	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£171.6	£158.3	£50.9	£4.8	£6.3	£2.1	£14.7	£4.7	£17.4	£3.5			£436.8	£11.0	
	Christchurch	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.7	£2.7	£47.8	£72.9	£0.5	£0.0	£0.0	£0.0	£8.6	£0.0			£163.3	£0.5	
	Poole	£0.0	£0.0	£0.0	£0.0	£0.2	£31.5	£0.0	£0.1	£0.0	£0.0	£0.0	£2.8	£3.2	£97.3	£1.0	£0.0	£3.1	£32.9	£200.7	£102.7	£2.0	£3.7			£481.2	£70.6
	All Others	£0.5	£0.1	£0.2	£30.1	£0.4	£12.9	£0.0	£8.1	£35.0	£6.7	£11.3	£4.7	£0.6	£4.2	£0.5	£4.1	£20.5	£4.8	£0.2	£3.2	£68.9	£164.1			£381.1	£135.4
Sub-Total: Outside Dorset Unitary area		£0.5	£0.1	£0.2	£30.1	£0.6	£47.1	£0.0	£8.2	£35.0	£6.7	£11.3	£7.6	£185.0	£262.6	£100.2	£81.9	£30.4	£39.7	£215.6	£110.6	£96.9	£192.2			£1,462.4	£217.5
Total		£32.1	£122.0	£36.0	£93.0	£53.8	£121.0	£29.6	£29.6	£86.7	£72.7	£55.8	£81.4	£186.5	£274.4	£100.2	£82.9	£133.2	£103.4	£218.9	£122.4	£116.7	£192.6			£2,344.6	£1,050.0

TABLE 3: 2025 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1-22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																									
Western Dorset Area																									
Dorchester	£0.1	£2.2	£3.8	£1.1	£18.4	£3.8	£9.5	£3.2	£0.0	£0.0	£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	£42.6	£42.6
Bridport	£0.0	£0.0	£0.3	£14.7	£0.0	£0.0	£0.0	£0.9	£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	£15.9	£15.9
Lyme Regis	£0.0	£0.0	£0.0	£6.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.2	£6.2
Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.4	£10.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.4	£11.4
Beaminstor	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£3.2	£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	£0.0	£0.0	£4.1	£4.1
All Smaller Villages / Local Centres	£0.0	£0.9	£1.9	£3.7	£3.1	£3.4	£3.2	£2.0	£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	£18.5	£18.5
All Out-of-Centre	£0.0	£2.0	£4.7	£37.9	£31.0	£11.8	£17.1	£12.0	£18.2	£1.1	£0.5	£4.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£140.8	£140.8
Western Dorset Total	£0.1	£5.0	£10.8	£64.3	£52.6	£19.0	£30.1	£21.7	£29.3	£1.2	£0.5	£4.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£239.4	£239.4	
Weymouth & Portland Area																									
Weymouth	£2.0	£8.9	£2.3	£0.0	£0.3	£0.1	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.9	£13.9	
Portland, Easton	£19.5	£2.7	£0.5	£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	£22.7	£22.7	
Portland, Fortuneswell	£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	£0.0	£0.0	£2.7	£2.7	
All Smaller Villages / Local Centres	£0.3	£4.2	£0.5	£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	£5.0	£5.0	
All Out-of-Centre	£9.5	£108.6	£26.4	£1.3	£6.4	£3.3	£2.8	£1.1	£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	£159.4	£159.4	
Weymouth & Portland Area Total	£33.9	£124.4	£29.7	£1.3	£6.7	£3.4	£2.9	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£203.7	£203.7	
Northern Dorset Area																									
Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£1.5	£1.0	£26.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.7	£28.7	
Gillingham	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£10.6	£44.2	£15.2	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£73.7	£73.7	
Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£4.3	£27.7	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£35.8	£35.8	
Sturminster Newton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£10.1	£0.2	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.1	£13.1	
Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2	£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	£9.0	£9.0	
All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.4	£0.2	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£3.2	
All Out-of-Centre	£0.0	£0.0	£0.0	£0.4	£0.0	£1.1	£0.0	£0.0	£1.3	£10.3	£2.2	£41.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£56.4	£56.4	
Northern Dorset Total	£0.0	£0.0	£0.0	£0.7	£0.0	£1.2	£0.0	£0.0	£25.5	£71.5	£46.6	£74.3	£0.0	£0.3	£0.0	£0.0	£0.0	£1.9	£0.2	£0.4	£2.1	£0.0	£224.8	£221.8	
Eastern Dorset																									
Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£6.6	£0.0	£0.8	£58.0	£18.3	£0.0	£0.6	£5.9	£0.0	£91.4	£76.7	
Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£3.0	£0.0	£0.2	£42.6	£2.9	£2.0	£0.0	£11.4	£0.0	£62.7	£45.4	
Wimborne	£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	£1.9	£0.0	£0.0	£1.4	£41.7	£1.1	£7.3	£0.7	£0.0	£55.7	£44.7	
West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£1.7	
Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£5.7	£0.0	£3.5	£0.0	£0.0	£9.5	£6.0	
West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1	
Other East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£11.5	£0.0	£1.0	£105.0	£68.6	£3.1	£11.3	£18.0	£0.0	£222.1	£175.7	
Purbeck Area																									
Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£49.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£51.1	£50.5	
Wareham	£0.0	£0.0	£0.0	£0.0	£0.3	£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	£3.3	£3.3	
Wool	£0.0	£0.0	£0.0	£0.0	£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	£3.1	£3.1	
Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.3	£55.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£57.5	£56.9	
Sub-Total: Within Dorset Unitary area	£34.0	£129.4	£40.5	£66.4	£59.6	£80.9	£33.0	£23.1	£54.7	£72.7	£47.1	£79.0	£1.5	£11.8	£0.0	£1.0	£106.4	£70.6	£3.3	£12.0	£20.1	£0.4	£947.4	£897.4	
OUTSIDE DORSET UNITARY AUTHORITY AREA																									
Bournemouth	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£170.9	£158.3	£51.0	£4.8	£6.5	£2.3	£14.7	£4.7	£17.6	£3.5	£437.1	£11.7	
Christchurch	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.6	£2.7	£47.9	£73.1	£0.5	£0.0	£0.0	£8.8	£20.9		£163.7	£0.5	
Poole	£0.0	£0.0	£0.0	£0.3	£34.5	£0.0	£0.1	£0.0	£0.0	£0.0	£3.0	£3.2	£97.3	£1.0	£0.0	£3.2	£36.4	£200.9	£103.4	£2.0	£3.6		£488.9	£77.5	
All Others	£0.5	£0.1	£0.3	£31.9	£0.4	£14.2	£0.0	£8.7	£37.1	£7.3	£11.9	£5.1	£0.6	£4.2	£0.5	£4.2	£21.2	£5.3	£0.2	£3.2	£69.9	£163.5	£390.3	£144.0	
Sub-Total: Outside Dorset Unitary area	£0.5	£0.1	£0.3	£31.9	£0.7	£51.5	£0.0	£8.9	£37.1	£7.3	£11.9	£8.1	£184.3	£262.5	£100.5	£82.1	£31.4	£44.0	£215.7	£111.3	£98.3	£191.6	£1,480.0	£233.7	
Total	£34.6	£129.5	£40.7	£98.2	£60.3	£132.4	£33.0	£32.0	£91.9	£80.0	£59.0	£87.1	£185.7	£274.3	£100.5	£83.1	£137.8	£114.5	£219.0	£123.3	£118.4	£192.0	£2,427.4	£1,131.1	

TABLE 4: 2030 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)
WITHIN DORSET UNITARY AUTHORITY AREA																								
Western Dorset Area																								
Dorchester	£0.1	£2.3	£3.8	£1.1	£17.8	£3.9	£9.1	£3.2	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£41.7	£41.7
Bridport	£0.0	£0.0	£0.3	£15.6	£0.0	£0.0	£0.0	£0.9	£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	£16.7	£16.7
Lyme Regis	£0.0	£0.0	£0.0	£6.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.5	£6.5
Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.4	£10.7	£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	£11.3	£11.3
Beaminster	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£3.2	£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	£0.0	£4.1	£4.1
All Smaller Villages / Local Centres	£0.0	£0.9	£1.9	£4.0	£3.0	£3.4	£3.0	£2.0	£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	£18.5	£18.5
All Out-of-Centre	£0.0	£2.1	£4.7	£40.0	£30.0	£11.9	£16.3	£12.0	£18.1	£1.1	£0.5	£4.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£141.1	£141.1
Western Dorset Total	£0.1	£5.3	£10.7	£67.9	£50.8	£19.2	£28.6	£21.7	£29.0	£1.3	£0.5	£4.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£239.9	£239.9	
Weymouth & Portland Area																								
Weymouth	£2.0	£9.3	£2.3	£0.0	£0.3	£0.1	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.4	£14.4	
Portland, Easton	£19.9	£2.8	£0.5	£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	£23.3	£23.3	
Portland, Fortuneswell	£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	£0.0	£2.7	£2.7	
All Smaller Villages / Local Centres	£0.3	£4.4	£0.5	£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	£5.2	£5.2	
All Out-of-Centre	£9.7	£113.7	£26.4	£1.4	£6.2	£3.3	£2.7	£1.1	£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	£164.5	£164.5	
Weymouth & Portland Area Total	£34.7	£130.2	£29.7	£1.4	£6.5	£3.4	£2.8	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£210.0	£210.0	
Northern Dorset Area																								
Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£1.5	£1.0	£26.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£29.0	£29.0	
Gillingham	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£10.5	£44.8	£15.0	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£74.0	£74.0	
Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£4.4	£27.2	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£35.4	£35.4	
Sturminster Newton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£10.2	£0.2	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.2	£13.2	
Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.9	£8.9	
All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.4	£0.2	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£3.2	
All Out-of-Centre	£0.0	£0.0	£0.0	£0.4	£0.0	£1.1	£0.0	£0.0	£1.3	£10.4	£2.2	£41.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£56.9	£56.9	
Northern Dorset Total	£0.0	£0.0	£0.0	£0.8	£0.0	£1.3	£0.0	£0.0	£25.2	£72.5	£45.8	£75.1	£0.0	£0.3	£0.0	£0.0	£0.0	£1.8	£0.2	£0.4	£2.1	£0.0	£225.5	£222.4
Eastern Dorset																								
Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£6.6	£0.0	£0.8	£58.0	£17.4	£0.0	£0.6	£5.9	£0.0	£90.6	£75.9
Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£3.0	£0.0	£0.2	£42.6	£2.7	£2.0	£0.0	£11.4	£0.0	£62.7	£45.3
Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£1.4	£39.7	£1.1	£7.3	£0.7	£0.0	£53.8	£42.7	
West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£1.7	
Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£5.5	£0.0	£3.5	£0.0	£0.0	£9.2	£5.7	
West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1	
Other East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£11.6	£0.0	£1.0	£105.0	£65.3	£3.1	£11.4	£18.1	£0.0	£219.1	£172.4	
Purbeck Area																								
Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£49.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£51.6	£50.9	
Wareham	£0.0	£0.0	£0.0	£0.0	£0.3	£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	£3.3	£3.3	
Wool	£0.0	£0.0	£0.0	£0.0	£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	£3.1	£3.1	
Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.3	£55.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£58.0	£57.4	
Sub-Total: Within Dorset Unitary area	£34.8	£135.5	£40.4	£70.1	£57.5	£81.6	£31.4	£23.1	£54.2	£73.7	£46.3	£79.8	£1.5	£11.9	£0.0	£1.0	£106.4	£67.1	£3.3	£12.1	£20.2	£0.4	£952.5	£902.1
OUTSIDE DORSET UNITARY AUTHORITY AREA																								
Bournemouth	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£171.7	£159.6	£51.6	£4.9	£6.5	£2.2	£14.8	£4.7	£17.7	£3.5	£440.0	£11.6	
Christchurch	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.7	£2.8	£48.4	£73.9	£0.5	£0.0	£0.0	£0.0	£8.8	£20.9	£0.0	£165.0	£0.5
Poole	£0.0	£0.0	£0.0	£0.0	£0.3	£34.8	£0.0	£0.1	£0.0	£0.0	£0.0	£3.1	£3.2	£98.1	£1.0	£0.0	£3.2	£34.7	£202.2	£104.3	£2.0	£3.6	£490.5	£76.1
All Others	£0.5	£0.1	£0.3	£33.7	£0.4	£14.3	£0.0	£8.7	£36.8	£7.4	£11.7	£5.1	£0.6	£4.2	£0.5	£4.2	£21.2	£5.0	£0.2	£3.2	£70.1	£163.5	£391.9	£145.3
Sub-Total: Outside Dorset Unitary area	£0.5	£0.1	£0.3	£33.7	£0.7	£52.0	£0.0	£8.9	£36.8	£7.4	£11.7	£8.2	£185.1	£264.7	£101.5	£83.0	£31.4	£41.8	£217.1	£112.3	£98.6	£191.6	£1,487.4	£233.5
Total	£35.4	£135.6	£40.7	£103.8	£58.2	£133.6	£31.4	£32.0	£91.0	£81.2	£58.0	£88.0	£186.6	£276.6	£101.5	£84.0	£137.8	£109.0	£220.5	£124.3	£118.8	£192.0	£2,439.9	£1,135.7

TABLE 5: 2035 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)		
WITHIN DORSET UNITARY AUTHORITY AREA																										
Western Dorset Area		Dorchester	£0.1	£2.2	£3.7	£1.1	£19.2	£3.8	£9.4	£3.3	£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	£43.1	£43.1	
		Bridport	£0.0	£0.0	£0.2	£15.3	£0.0	£0.0	£0.0	£0.9	£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	£16.4	£16.4	
		Lyme Regis	£0.0	£0.0	£0.0	£6.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.4	£6.4	
		Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.4	£11.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.8	£11.8	
		Beaminsters	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£3.3	£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	£4.1	£4.1	
		All Smaller Villages / Local Centres	£0.0	£0.9	£1.9	£3.9	£3.3	£3.4	£3.1	£2.0	£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	£18.7	£18.7	
		All Out-of-Centre	£0.0	£2.0	£4.6	£39.3	£32.3	£11.7	£16.9	£12.1	£18.9	£1.1	£0.5	£4.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£143.6	£143.6	
		Western Dorset Total	£0.1	£5.0	£10.4	£66.7	£54.8	£18.9	£29.7	£21.9	£30.2	£1.2	£0.5	£4.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£244.1	£244.1		
Weymouth & Portland Area		Weymouth	£1.9	£8.8	£2.2	£0.0	£0.3	£0.1	£0.1	£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	£13.8	£13.8		
		Portland, Easton	£19.0	£2.7	£0.5	£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	£22.2	£22.2		
		Portland, Fortuneswell	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£2.6		
		All Smaller Villages / Local Centres	£0.3	£4.2	£0.5	£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	£4.9	£4.9		
		All Out-of-Centre	£9.2	£108.2	£25.6	£1.4	£6.7	£3.3	£2.8	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£158.3	£158.3		
		Weymouth & Portland Area Total	£33.0	£123.9	£28.9	£1.4	£7.0	£3.4	£2.9	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£201.7	£201.7		
Northern Dorset Area		Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.4	£0.9	£25.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.1	£28.1		
		Gillingham	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£11.0	£42.8	£14.7	£3.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£72.1	£72.1		
		Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£4.2	£26.6	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£34.7	£34.7		
		Sturminster Newton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£9.7	£0.2	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.8	£12.8		
		Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.5	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.2	£9.2		
		All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.4	£0.2	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.1	£3.1		
		All Out-of-Centre	£0.0	£0.0	£0.0	£0.4	£0.0	£1.1	£0.0	£1.3	£10.0	£2.1	£40.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£55.1	£55.1		
		Northern Dorset Total	£0.0	£0.0	£0.0	£0.8	£0.0	£1.2	£0.0	£0.0	£26.3	£69.3	£44.8	£72.7	£0.0	£0.3	£0.0	£0.0	£0.0	£1.9	£0.2	£0.4	£22.0	£217.0		
Eastern Dorset		Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.7	£6.7	£0.0	£0.8	£58.0	£17.5	£0.0	£0.6	£6.0	£0.0	£90.7	£75.8		
		Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£3.1	£0.0	£0.2	£42.5	£2.7	£2.0	£0.0	£11.5	£0.0	£62.7	£45.3		
		Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£1.4	£39.8	£1.1	£7.4	£0.7	£0.0	£54.0	£42.8		
		West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£1.7		
		Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£5.5	£0.0	£3.5	£0.0	£0.0	£9.3	£5.7		
		West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1		
		Other East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	
		Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£11.7	£0.0	£1.0	£104.9	£65.5	£3.1	£11.6	£18.2	£0.0	£219.4	£172.4		
Purbeck Area		Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£49.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£51.0	£50.3		
		Wareham	£0.0	£0.0	£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	£0.0	£3.3	£3.3		
		Wool	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£3.0		
		Purbeck Area Total	£0.0	£0.0	£0.0	£0.3	£55.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£57.3	£56.7		
Sub-Total: Within Dorset Unitary area			£33.1	£128.9	£39.3	£68.8	£62.0	£80.6	£32.5	£23.3	£56.6	£70.5	£45.3	£77.3	£1.5	£11.9	£0.0	£1.0	£106.3	£67.3	£3.3	£12.2	£20.3	£0.4	£942.6	£891.9
OUTSIDE DORSET UNITARY AUTHORITY AREA																										
		Bournemouth	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£172.0	£160.1	£52.1	£4.9	£6.5	£2.2	£14.9	£4.8	£17.8	£3.5	£441.6	£11.5		
		Christchurch	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.7	£2.8	£48.9	£74.7	£0.5	£0.0	£0.0	£0.0	£8.9	£20.9	£166.4	£0.5		
		Poole	£0.0	£0.0	£0.0	£0.3	£34.4	£0.0	£0.1	£0.0	£0.0	£3.0	£3.2	£98.4	£1.0	£0.0	£3.2	£34.8	£203.8	£105.5	£2.0	£3.6	£493.3	£75.7		
		All Others	£0.5	£0.1	£0.2	£33.0	£4.4	£14.1	£0.0	£8.8	£7.1	£11.5	£5.0	£0.6	£4.2	£0.5	£4.2	£21.2	£5.0	£0.2	£3.3	£70.6	£163.7	£392.7		
		Sub-Total: Outside Dorset Unitary area	£0.5	£0.1	£0.2	£33.0	£0.7	£51.4	£0.0	£8.9	£38.4	£7.1	£11.5	£7.9	£185.5	£265.5	£102.5	£83.9	£31.4	£42.0	£218.9	£113.6	£99.3	£191.8	£1,494.0	£233.2
Total			£33.6	£129.1	£39.6	£101.8	£62.7	£132.0	£32.5	£32.3	£94.9	£77.6	£56.8	£85.3	£187.0	£277.4	£102.5	£84.9	£137.7	£109.3	£222.2	£125.8	£119.6	£192.2	£2,436.7	£1,125.1

TABLE 6: 2040 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																										
Western Dorset Area																										
	Dorchester	£0.1	£2.2	£3.7	£1.1	£19.9	£3.9	£9.5	£3.4	£0.0	£0.0	£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	£44.1	£44.1
	Bridport	£0.0	£0.0	£0.2	£15.3	£0.0	£0.0	£0.0	£0.9	£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	£16.5	£16.5
	Lyme Regis	£0.0	£0.0	£0.0	£6.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.4	£6.4
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.4	£11.3	£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	£11.9	£11.9
	Beaminster	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£3.4	£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	£4.3	£4.3
	All Smaller Villages / Local Centres	£0.0	£0.9	£1.9	£3.9	£3.4	£3.4	£3.2	£2.1	£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	£19.0	£19.0
	All Out-of-Centre	£0.0	£1.9	£4.6	£39.5	£33.4	£11.9	£17.1	£12.6	£19.1	£1.0	£0.5	£4.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£146.1	£146.1
	Western Dorset Total	£0.1	£5.0	£10.4	£67.0	£56.7	£19.3	£29.9	£22.8	£30.6	£1.2	£0.5	£4.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£248.3	£248.3
Weymouth & Portland Area																										
	Weymouth	£2.0	£8.8	£2.2	£0.0	£0.3	£0.1	£0.1	£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	£13.8	£13.8
	Portland, Easton	£19.3	£2.7	£0.5	£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	£0.0	£22.5	£22.5
	Portland, Fortuneswell	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£2.6
	All Smaller Villages / Local Centres	£0.3	£4.1	£0.5	£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	£0.0	£4.9	£4.9
	All Out-of-Centre	£9.4	£107.5	£25.5	£1.4	£6.9	£3.3	£2.8	£1.2	£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	£158.0	£158.0
	Weymouth & Portland Area Total	£33.6	£123.1	£28.7	£1.4	£7.2	£3.4	£2.9	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£201.8	£201.8
Northern Dorset Area																										
	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£1.4	£1.0	£26.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.7	£28.7
	Gillingham	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£11.1	£41.3	£14.8	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£71.0	£71.0
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8	£4.1	£26.8	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£34.8	£34.8
	Sturminster Newton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£9.4	£0.2	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.5	£12.5
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.6	£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	£9.3	£9.3
	All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.3	£0.2	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£3.2
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.4	£0.0	£1.1	£0.0	£0.0	£1.3	£9.6	£2.1	£41.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£55.9	£55.9
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.8	£0.0	£1.3	£0.0	£0.0	£26.7	£66.9	£45.2	£74.6	£0.0	£0.3	£0.0	£0.0	£0.0	£1.9	£0.2	£0.4	£2.2	£0.0	£0.0	£220.4	£217.4
Eastern Dorset																										
	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£6.7	£0.0	£0.9	£58.9	£18.2	£0.0	£0.6	£6.1	£0.0	£92.4	£77.4	
	Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£3.1	£0.0	£0.2	£43.2	£2.8	£2.0	£0.0	£11.6	£0.0	£63.7	£46.0	
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£1.4	£41.4	£1.1	£7.5	£0.7	£0.0	£55.7	£44.4	
	West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£1.7	
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£5.7	£0.0	£3.6	£0.0	£0.0	£9.5	£6.0	
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1	
	Other East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£11.7	£0.0	£1.0	£106.5	£68.1	£3.1	£11.7	£18.4	£0.0	£224.1	£176.7	
Purbeck Area																										
	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£49.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£51.9	£51.3	
	Wareham	£0.0	£0.0	£0.0	£0.0	£0.3	£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	£3.4	£3.4
	Wool	£0.0	£0.0	£0.0	£0.0	£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	£3.1	£3.1
	Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.3	£56.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.3	£0.0	£0.4	£58.4	£57.7	
Sub-Total: Within Dorset Unitary Area		£33.7	£128.1	£39.1	£69.2	£64.2	£82.1	£32.8	£24.2	£57.3	£68.1	£45.7	£79.3	£1.5	£12.0	£0.0	£1.0	£107.9	£70.0	£3.4	£12.4	£20.6	£0.4	£953.0	£901.8	
OUTSIDE DORSET UNITARY AUTHORITY AREA																										
	Bournemouth	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£172.0	£160.2	£52.4	£5.0	£6.6	£2.3	£15.0	£4.8	£18.1	£3.5		£442.8	£11.8	
	Christchurch	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.7	£2.8	£49.2	£75.4	£0.6	£0.0	£0.0	£0.0	£9.0	£20.9		£167.5	£0.6	
	Poole	£0.0	£0.0	£0.0	£0.3	£35.0	£0.1	£0.0	£0.0	£0.0	£0.0	£3.1	£3.2	£98.5	£1.0	£0.0	£3.2	£36.1	£205.3	£106.8	£2.1	£3.6		£498.3	£77.8	
	All Others	£0.5	£0.1	£0.2	£33.2	£0.4	£14.4	£0.0	£9.2	£38.9	£6.9	£11.6	£5.1	£0.6	£4.2	£0.5	£4.3	£21.5	£5.2	£0.2	£3.3	£71.6	£163.5	£395.4	£147.2	
	Sub-Total: Outside Dorset Unitary Area	£0.5	£0.1	£0.2	£33.2	£0.7	£52.3	£0.0	£9.3	£38.9	£6.9	£11.6	£8.2	£185.5	£265.6	£103.2	£84.6	£31.9	£43.6	£220.5	£114.9	£100.7	£191.5	£1,504.0	£237.4	
Total		£34.3	£128.2	£39.3	£102.4	£65.0	£134.4	£32.8	£33.5	£96.2	£74.9	£57.3	£87.5	£187.0	£277.6	£103.2	£85.6	£139.8	£113.6	£223.8	£127.3	£121.3	£191.9	£2,456.9	£1,139.2	

APPENDIX 10:
Composite Scenario: Convenience Goods:
Capacity

TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)
 Excluding SFT & 'Inflow' from outside Study Area

	2022	2025	2030	2035	2040
Western Dorset Area	£220.2	£239.4	£239.9	£244.1	£248.3
Weymouth & Portland Area	£189.0	£203.7	£210.0	£201.7	£201.8
Northern Dorset Area	£209.0	£224.8	£225.5	£220.0	£220.4
Eastern Dorset	£211.3	£222.1	£219.1	£219.4	£224.1
Purbeck Area	£52.7	£57.5	£58.0	£57.3	£58.4
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:	£882.2	£947.4	£952.5	£942.6	£953.0

TABLE 2 ALL CONVENIENCE GOODS - TOTAL TURNOVER
 Including 'Inflow' from outside Study Area

	Estimated 'Inflow' from outside Study Area	2022	2025	2030	2035	2040
Western Dorset Area	5%	£231.8	£252.0	£252.6	£256.9	£261.3
Weymouth & Portland Area	5%	£199.0	£214.4	£221.1	£212.4	£212.4
Northern Dorset Area	3%	£215.5	£231.7	£232.5	£226.8	£227.3
Eastern Dorset	3%	£217.9	£228.9	£225.8	£226.2	£231.0
Purbeck Area	3%	£54.3	£59.3	£59.8	£59.1	£60.2
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:		£918.4	£986.3	£991.7	£981.4	£992.2

TABLE 3: COMMITTED CONVENIENCE GOODS FLOORSPACE

	CENTRE	PLANNING REF	LOCATION	Gross Floorspace (sq m)	Net Floorspace (sq m)	2022 Average Sales Density (£ per sqm)	FORECAST TURNOVER (£M)				
							2022	2025	2030	2035	2040
[1]	Bradford Abbas Parish (Out-of-Centre)	WD/D/16/000486	Land adj. Unit 4, Peel Centre, Babylon Hill, Yeovil	N/A	569	11,000	£6.3	£6.3	£6.4	£6.5	£6.6
[2]	Shaftesbury (Out-of-Centre)	P/FUL/2020/00008	Former Cattle Market Christys Lane Shaftesbury Dorset SP7 8PH	2,089	348	11,000	£3.8	£3.9	£3.9	£4.0	£4.0
[3]	West Parley (Out-of-Centre)	3/17/3609/OUT	Land East of New Road, West Parley, Dorset	3,200	1,408	11,000	£15.5	£15.6	£15.8	£16.1	£16.3
[4]	Wimborne Minster (Out-of-Centre)	3/14/0016/OUT	East and West of Cranborne Road, Burts Hill, Wimborne.	1,400	896	11,000	£9.9	£9.9	£10.1	£10.2	£10.4
[5]	Littlemoor (Out-of-Centre)	WP/16/00253/OUT	Lands to north of Littlemoor Road, Weymouth	850	544	11,000	£6.0	£6.0	£6.1	£6.2	£6.3
[6]	Gillingham (Out-of-Centre)	2/2018/0036/OUT	West Of Shaftesbury Road At Land South Of Gillingham Shaftesbury Road Gillingham Dorset	760	608	11,000	£6.7	£6.7	£6.8	£6.9	£7.1
[7]	Bridport (Out-of-Centre)	WD/D/17/000986	Land at Vearse Farm, Bridport	1,000	800	11,000	£8.8	£8.9	£9.0	£9.1	£9.3
TOTAL					5,173		£56.9	£57.4	£58.2	£59.1	£60.0

Notes:

- [1] WD/D/16/000486: Erection of retail warehouse unit for unrestricted A1 Non-food retail use. Total area of 1,895 sqm net of which maximum convenience goods floorspace is 569 sqm net and comparison goods floorspace is 1,326 sqm net.
- [2] P/FUL/2020/00008: Erection of retail foodstore with associated car parking, access, landscaping and engineering works. Officer's report indicates an internal sales area of 1,161sqm net. Assumed that of this floorspace 70% will be for convenience goods and 30% for comparison goods.
- [3] 3/17/3609/OUT: Outline application (All matters reserved except for access and associated link road); with up to 386 dwellings (Class C3); up to 1000sqm of retail units (Classes A1-A5); up to 900sqm of offices (Class B1) and up to 2200sqm of foodstore (Class A1); together with accesses, a link road and associated highway works, public open space including SANG, allotments, landscaping and associated works. In relation to the 2,200sqm gross foodstore (a 80% gross to net ratio has been applied and of which 80% is assumed for convenience goods and 20% for comparison goods) floorspace. Additionally based on the floorspace of 1,000 sqm gross for the retail units (a 90% gross to net ratio has been applied) and assumed for comparison goods floorspace only).
- [4] 3/14/0016/OUT - Residential development of up to 630 dwellings, a new local centre, a replacement and extended Wimborne First School, public open space and new allotments together with new access, streets and other related infrastructure (All Matters Reserved). The Council has provided a gross floorspace estimate of some 1,400sqm. This has been netted down to 1,120 sqm net assuming a gross to net ratio of 80%. It is assumed that of this net total 80% will be for convenience goods (896 sqm net) and the remainder (20%) or 224 sqm net will be for comparison goods only.
- [5] WP/16/00253/OUT - Outline application for a mixed use development comprising: up to 500 dwellings, including affordable housing; up to 8 ha of employment land (to include a new hotel, residential care home, car show rooms and other employment land); land for a new primary school; a new local centre; public open spaces; new accesses and roads, and associated infrastructure. The Council has provided a gross floorspace estimate of some 850sqm net has been netted down to 680 sqm net assuming a gross to net ratio of 80%. Of this it is assumed that 80% will be for convenience goods (544 sqm net) and the remainder (20%) or 136 sqm net will be for comparison goods only.
- [6] 2/2018/0036/OUT - Develop land by construction of an urban extension to the south of Gillingham between Shaftesbury Road (B3081) and New Road (B3092). The urban extension would comprise of up to 961 dwellings, up to 2,642 sq.m in a new local centre providing retail, community, health, and leisure uses, new and enhanced pedestrian/cycle routes, open spaces, roads, car parking and vehicular access. To include all ancillary works and associated infrastructure. (Outline application to determine access only). A1 (Convenience Retail) of 760 sqm GEA proposed. This has been netted down by 80% to 608 sqm net and for convenience goods only.
- [7] WD/D/17/000986 - Outline application for the development of up to 760 dwellings, 60 unit care home (Use Class C2), 4 hectares of land for employment (Use Classes B1, B2, B8), mixed use local centre (Use Classes A1, A2, A3, A4, A5, B1, C3 and D1), primary school and associated playing fields (Use Class D1), areas of public open space and allotments, drainage works, the formation of new vehicular accesses to West Road and the formation of new pedestrian and cycle links. Assumed retail will not exceed 1,000sqm gross and assumed for convenience goods only. This has been netted down by 80% to 800 sqm net and for convenience goods only.

TABLE 4: DORSET UNITARY AUTHORITY AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035	2040
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£918.4	£986.3	£991.7	£981.4	£992.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£918.4	£925.8	£939.7	£953.9	£968.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£60.6	£52.0	£27.5	£23.9
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£57.4	£58.2	£59.1	£60.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	£3.2	-£6.2	-£31.6	-£36.1
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	289	-555	-2,764	-3,112
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		413	-792	-3,949	-4,445

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 2).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 3. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2025.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, etc.).

TABLE 5: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT (NET SQ M)
Assume Equilibrium at 2022 and Constant Market Shares

	2025	2030	2035	2040
TOTAL DORSET UNITARY AREA WIDE CONVENIENCE GOODS CAPACITY	289	-555	-2,764	-3,112

TABLE 6: DORSET - CONVENIENCE GOODS CAPACITY ASSESSMENT BY CENTRE AND UNITARY AUTHORITY AREA (sqm net)

	2025	2030	2035	2040
Western Dorset Area				
Dorchester	372	229	303	331
Bridport	73	128	78	66
Lyme Regis	27	51	30	25
Sherborne	55	28	56	55
Beaminster	25	23	18	24
All Smaller Villages / Local Centres	139	115	104	105
All Out-of-Centre	165	-3	28	59
Sub-Total	855	570	617	663
Weymouth & Portland Area				
Weymouth	85	107	33	13
Portland, Easton	138	162	25	24
Portland, Fortuneswell	16	19	2	3
All Smaller Villages / Local Centres	27	39	10	1
All Out-of-Centre	436	682	-117	-361
Sub-Total	703	1,008	-48	-320
Northern Dorset Area				
Blandford Forum	158	143	21	39
Gillingham	479	406	128	-66
Shaftesbury	173	84	-26	-58
Sturminster Newton	93	87	31	-11
Stalbridge	43	25	41	37
All Smaller Villages / Local Centres / All Other	34	16	5	8
All Out-of-Centre	-1,197	-1,226	-1,464	-1,469
Sub-Total	-216	-464	-1,263	-1,521
Eastern Dorset				
Ferndown	294	95	-23	6
Verwood	129	37	-42	-43
Wimborne	-534	-787	-841	-760
West Moors	4	2	-1	-1
Corfe Mullen	48	12	5	16
West Parley	-1,405	-1,407	-1,408	-1,408
Other Eastern Dorset	0	0	0	0
Sub-Total	-1,464	-2,047	-2,310	-2,190
Purbeck Area				
Purbeck (District)	364	335	210	224
Wareham	25	22	16	17
Wool	22	21	13	14
Sub-Total	411	378	240	256
TOTAL DORSET UNITARY AREA WIDE CONVENIENCE GOODS CAPACITY	289	-555	-2,764	-3,112

APPENDIX 11:

Composite Scenario: Comparison Goods: Population and Expenditure

TABLE 1A: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2022) POPULATION & PROJECTIONS (to 2040) GROWTH 2022 to 2040:

ZONE:	2022	2025	2030	2035	2040	%	2022-40
Zone 1	13,875	14,006	14,237	14,428	14,671	5.7%	796
Zone 2	49,933	50,379	51,033	51,578	51,922	4.0%	1,989
Zone 3	13,980	14,287	14,643	14,955	15,294	9.4%	1,314
Zone 4	33,790	34,512	35,553	36,343	36,926	9.3%	3,136
Zone 5	21,947	22,332	22,874	23,418	23,997	9.3%	2,050
Zone 6	47,141	48,012	49,054	49,746	50,322	6.7%	3,181
Zone 7	10,746	11,014	11,404	11,687	11,983	11.5%	1,237
Zone 8	10,546	10,827	11,177	11,401	11,587	9.9%	1,041
Zone 9	32,245	32,657	33,152	33,500	33,763	4.7%	1,518
Zone 10	28,224	28,308	28,404	28,507	28,594	1.3%	370
Zone 11	20,934	21,114	21,225	21,319	21,469	2.6%	535
Zone 12	31,811	32,004	32,269	32,483	32,812	3.1%	1,001
Zone 13	77,310	77,411	77,892	77,920	77,772	0.6%	462
Zone 14	114,839	115,435	116,575	116,696	116,574	1.5%	1,735
Zone 15	40,434	40,756	41,247	41,569	41,797	3.4%	1,363
Zone 16	31,973	32,243	32,628	32,926	33,154	3.7%	1,181
Zone 17	50,915	51,308	51,713	51,884	51,872	1.9%	957
Zone 18	39,232	39,701	40,268	40,738	41,417	5.6%	2,185
Zone 19	88,182	88,735	89,440	90,000	90,491	2.6%	2,309
Zone 20	49,210	49,691	50,259	50,791	51,277	4.2%	2,067
Zone 21	43,115	43,420	43,808	44,330	44,877	4.1%	1,762
Zone 22	68,559	68,725	68,823	68,777	68,557	0.0%	-2
Study Area (Zones 1 - 22)	918,941	926,877	937,678	944,996	951,128	3.5%	32,187
Representative DC Area (Zones 1-12 ; 17,18)	405,319	410,461	417,006	421,987	426,629	5.3%	21,310

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2022) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 1B: DORSET COUNCIL HOUSING ALLOCATIONS - PROJECTED ADDITIONAL INCREASE IN POPULATION

ZONE:		2025	2030	2035	2040	Increase
Zone 1	Zone Within District Boundary	1,034	1,183	206	206	2,730
Zone 2	Zone Within District Boundary	2,920	4,851	1,506	722	9,998
Zone 3	Zone Within District Boundary	1,643	1,285	504	58	3,490
Zone 4	Zone Extends Beyond District Boundary	1,391	2,434	862	416	5,104
Zone 5	Zone Within District Boundary	2,405	1,060	2,336	2,626	8,427
Zone 6	Zone Within District Boundary	3,870	3,381	1,963	2,246	11,460
Zone 7	Zone Within District Boundary	1,063	98	205	0	1,366
Zone 8	Zone Within District Boundary	618	285	137	384	1,424
Zone 9	Zone Extends Beyond District Boundary	1,709	946	2,003	2,144	6,802
Zone 10	Zone Extends Beyond District Boundary	2,920	3,311	1,746	573	8,550
Zone 11	Zone Predominantly Outside District Boundary	1,152	687	99	99	2,038
Zone 12	Zone Within District Boundary	2,234	2,363	999	1,489	7,085
Zone 13	Zone Outside District Boundary	0	0	0	0	0
Zone 14	Zone Outside District Boundary	0	0	0	0	0
Zone 15	Zone Outside District Boundary	0	0	0	0	0
Zone 16	Zone Outside District Boundary	0	0	0	0	0
Zone 17	Zone Extends Beyond District Boundary	1,674	1,354	1,030	1,760	5,818
Zone 18	Zone Extends Beyond District Boundary	4,006	1,377	964	1,853	8,201
Zone 19	Zone Outside District Boundary	0	0	0	0	0
Zone 20	Zone Predominantly Outside District Boundary	121	59	22	54	256
Zone 21	Zone Predominantly Outside District Boundary	570	379	74	74	1,098
Zone 22	Zone Outside District Boundary	0	0	0	0	0
Study Area (Zones 1 - 22)		29,331	25,052	14,657	14,705	14,705
Representative DC Area (Zones 1-12 ; 17,18)		28,640	24,614	14,561	14,577	14,577

Source: Dorset Council 2018 ward based mid-year projections for each ward within the Council area

TABLE 1C: REVISED COMPOSITE POPULATION & PROJECTIONS (to 2040)

ZONE:	2022	2025	2030	2035	2040	%	2022-40
Zone 1	13,875	15,040	15,420	14,634	14,877	7.2%	1,002
Zone 2	49,933	53,299	55,884	53,084	52,644	5.4%	2,711
Zone 3	13,980	15,930	15,928	15,459	15,352	9.8%	1,372
Zone 4	33,790	35,903	37,987	37,205	37,342	10.5%	3,552
Zone 5	21,947	24,737	23,934	25,754	26,623	21.3%	4,676
Zone 6	47,141	51,882	52,435	51,709	52,568	11.5%	5,427
Zone 7	10,746	12,077	11,502	11,892	11,983	11.5%	1,237
Zone 8	10,546	11,445	11,462	11,538	11,971	13.5%	1,425
Zone 9	32,245	34,366	34,098	35,503	35,907	11.4%	3,662
Zone 10	28,224	31,228	31,715	30,253	29,167	3.3%	943
Zone 11	20,934	22,266	21,912	21,418	21,568	3.0%	634
Zone 12	31,811	34,238	34,632	33,482	34,301	7.8%	2,490
Zone 13	77,310	77,411	77,892	77,920	77,772	0.6%	462
Zone 14	114,839	115,435	116,575	116,696	116,574	1.5%	1,735
Zone 15	40,434	40,756	41,247	41,569	41,797	3.4%	1,363
Zone 16	31,973	32,243	32,628	32,926	33,154	3.7%	1,181
Zone 17	50,915	52,982	53,067	52,914	53,632	5.3%	2,717
Zone 18	39,232	43,707	41,645	41,702	43,270	10.3%	4,038
Zone 19	88,182	88,735	89,440	90,000	90,491	2.6%	2,309
Zone 20	49,210	49,812	50,318	50,813	51,331	4.3%	2,121
Zone 21	43,115	43,990	44,187	44,404	44,951	4.3%	1,836
Zone 22	68,559	68,725	68,823	68,777	68,557	0.0%	-2
Study Area (Zones 1 - 22)	918,941	956,208	962,730	959,653	965,833	5.1%	46,892
Representative DC Area (Zones 1-12 ; 17,18)	405,319	439,101	441,620	436,548	441,206	8.9%	35,887

Source / Notes: Dorset Council 2018 ward based mid-year projections for each ward within the Council area. These policy-led projections take into account forecast housing allocated growth. It should be noted that for Zones that are not covered by the Council data the Experian projections from Table 1 have been used. Additionally where the ward data extends outside the Council area the data has been combined with that derived from Experian. Finally, the base 2022 data is as derived from Experian at Table 1.

TABLE 2: REVISED COMPARISON EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2022	2022	2025	2030	2035	2040
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		23.9%	26.1%	28.3%	29.5%	30.1%
Zone 1	£3,557	£2,707	£2,856	£3,187	£3,615	£4,135
Zone 2	£3,992	£3,038	£3,205	£3,577	£4,057	£4,641
Zone 3	£4,546	£3,459	£3,649	£4,073	£4,620	£5,284
Zone 4	£4,801	£3,654	£3,855	£4,302	£4,880	£5,582
Zone 5	£4,168	£3,172	£3,346	£3,734	£4,236	£4,845
Zone 6	£4,549	£3,462	£3,652	£4,076	£4,623	£5,288
Zone 7	£5,103	£3,884	£4,097	£4,572	£5,187	£5,933
Zone 8	£4,991	£3,798	£4,007	£4,472	£5,073	£5,802
Zone 9	£4,722	£3,594	£3,791	£4,231	£4,800	£5,490
Zone 10	£4,433	£3,374	£3,559	£3,972	£4,506	£5,154
Zone 11	£4,813	£3,663	£3,864	£4,312	£4,892	£5,595
Zone 12	£4,615	£3,512	£3,705	£4,135	£4,691	£5,366
Zone 13	£3,982	£3,030	£3,197	£3,568	£4,047	£4,629
Zone 14	£3,994	£3,040	£3,207	£3,579	£4,060	£4,643
Zone 15	£4,235	£3,223	£3,400	£3,795	£4,305	£4,924
Zone 16	£4,471	£3,402	£3,589	£4,006	£4,544	£5,197
Zone 17	£4,819	£3,667	£3,869	£4,318	£4,898	£5,603
Zone 18	£4,921	£3,745	£3,951	£4,409	£5,002	£5,721
Zone 19	£4,206	£3,201	£3,377	£3,769	£4,275	£4,890
Zone 20	£4,406	£3,353	£3,537	£3,948	£4,478	£5,122
Zone 21	£4,982	£3,792	£4,000	£4,464	£5,064	£5,792
Zone 22	£5,012	£3,814	£4,023	£4,490	£5,094	£5,826
STUDY AREA (Zones 1-22) AVERAGE	£4,514	£3,436	£3,624	£4,045	£4,588	£5,248
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£4,574	£3,481	£3,672	£4,098	£4,649	£5,317

Source: Average spend per capita estimates (2020 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 19 published by Experian Business Strategies (January 2022).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 19 (January 2022).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2022) TO 2040 (£m)

	2022 (incl SFT)	2022	2025	2030	2035	2040
Zone 1	£49.4	£37.6	£43.0	£49.1	£52.9	£61.5
Zone 2	£199.3	£151.7	£170.8	£199.9	£215.4	£244.3
Zone 3	£63.5	£48.4	£58.1	£64.9	£71.4	£81.1
Zone 4	£162.2	£123.5	£138.4	£163.4	£181.6	£208.4
Zone 5	£91.5	£69.6	£82.8	£89.4	£109.1	£129.0
Zone 6	£214.4	£163.2	£189.5	£213.7	£239.1	£278.0
Zone 7	£54.8	£41.7	£49.5	£52.6	£61.7	£71.1
Zone 8	£52.6	£40.1	£45.9	£51.3	£58.5	£69.5
Zone 9	£152.3	£115.9	£130.3	£144.3	£170.4	£197.1
Zone 10	£125.1	£95.2	£111.1	£126.0	£136.3	£150.3
Zone 11	£100.8	£76.7	£86.0	£94.5	£104.8	£120.7
Zone 12	£146.8	£111.7	£126.9	£143.2	£157.1	£184.0
Zone 13	£307.8	£234.2	£247.4	£277.9	£315.3	£360.0
Zone 14	£458.7	£349.1	£370.2	£417.2	£473.7	£541.3
Zone 15	£171.3	£130.3	£138.6	£156.5	£178.9	£205.8
Zone 16	£142.9	£108.8	£115.7	£130.7	£149.6	£172.3
Zone 17	£245.4	£186.7	£205.0	£229.1	£259.2	£300.5
Zone 18	£193.1	£146.9	£172.7	£183.6	£208.6	£247.6
Zone 19	£370.9	£282.3	£299.7	£337.1	£384.8	£442.5
Zone 20	£216.8	£165.0	£176.2	£198.6	£227.6	£262.9
Zone 21	£214.8	£163.5	£176.0	£197.3	£224.9	£260.4
Zone 22	£343.6	£261.5	£276.5	£309.0	£350.3	£399.4
STUDY AREA (Zones 1-22)	£4,078.1	£3,103.4	£3,410.1	£3,829.3	£4,331.1	£4,987.9
Representative DC Area (Zones 1-12 ; 17,18) AVERAGE	£1,851.2	£1,408.8	£1,609.9	£1,805.0	£2,025.9	£2,343.2

GROWTH 2022 to 2040:

%	2022-40
63.8%	£24.0
61.1%	£92.6
67.8%	£32.8
68.8%	£85.0
85.3%	£59.4
70.4%	£114.8
70.4%	£29.4
73.4%	£29.4
70.1%	£81.3
57.9%	£55.1
57.4%	£44.0
64.7%	£72.3
53.7%	£125.8
55.1%	£192.2
57.9%	£75.5
58.4%	£63.5
60.9%	£113.8
68.5%	£100.6
56.8%	£160.2
59.4%	£97.9
59.3%	£96.9
52.8%	£138.0
60.7%	£1,884.4
66.3%	£934.4

APPENDIX 12:

Composite Scenario: Comparison Goods: Market Shares & Turnover (excluding SFT)

TABLE 1: ALL COMPARISON GOODS - 2022 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1-22	Representative DC Area (Zones 1-12; 17,18)			
WITHIN DORSET UNITARY AUTHORITY AREA																											
Western Dorset Area	Dorchester	6.5%	10.0%	23.6%	9.0%	68.4%	9.4%	62.4%	26.2%	1.8%	0.7%	0.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	10.3%	
	Bridport	0.0%	0.0%	0.4%	39.4%	0.2%	0.0%	0.0%	13.1%	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%	1.7%	3.8%	
	Lyme Regis	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%	
	Sherborne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.9%	22.2%	0.3%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.9%
	Beaminster	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	
	All Smaller Villages / Local Centres	0.0%	0.2%	1.1%	0.6%	0.6%	0.1%	1.0%	0.5%	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%	0.1%	0.2%	
	All Out-of-Centre	0.0%	0.5%	2.4%	1.5%	7.3%	1.7%	5.3%	1.4%	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.1%	
	Western Dorset Total	6.5%	10.7%	27.6%	54.6%	76.4%	11.2%	70.3%	47.4%	24.0%	1.0%	0.4%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	17.9%		
Weymouth & Portland Area	Weymouth	63.6%	62.4%	41.7%	0.2%	6.8%	0.9%	5.6%	1.4%	0.3%	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%	4.8%	10.5%	
	Portland, Easton	14.4%	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%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%	
	Portland, Fortuneswell	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	All Smaller Villages / Local Centres	0.3%	2.4%	0.9%	0.0%	0.3%	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	
	All Out-of-Centre	2.1%	13.9%	14.3%	0.1%	2.5%	0.6%	4.8%	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%	1.1%	2.4%	
	Weymouth & Portland Total	81.1%	79.0%	57.0%	0.3%	9.7%	1.6%	10.4%	1.6%	0.3%	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%	0.0%	6.2%	13.7%	
Northern Dorset Area	Blandford Forum	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.8%	0.0%	1.4%	3.4%	0.8%	44.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	4.0%	
	Gillingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	16.4%	5.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.6%	
	Shaftesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	5.2%	39.4%	1.3%	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%	1.2%	2.6%	
	Sturminster Newton	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	2.1%	8.9%	0.3%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.9%	
	Stalbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	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%	0.1%	0.2%	
	All Smaller Villages / Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	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%	0.0%	0.0%	0.0%	
	All Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	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%	0.1%	0.3%	
	Northern Dorset Total	0.0%	0.0%	0.0%	0.3%	0.2%	0.1%	0.8%	0.0%	8.5%	35.3%	46.6%	50.4%	0.0%	0.0%	0.2%	0.0%	0.0%	0.5%	0.0%	0.1%	0.9%	0.0%	4.5%	9.7%		
Eastern Dorset	Ferndown	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.7%	0.7%	0.2%	14.4%	1.2%	0.2%	0.3%	0.3%	0.2%	1.1%	2.0%			
	Verwood	0.0%	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%	0.2%	4.2%	0.1%	0.0%	0.0%	0.5%	0.0%	0.3%	0.6%			
	Wimborne	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.0%	0.4%	0.2%	1.7%	20.8%	0.3%	2.4%	3.7%	0.0%	1.6%	2.5%		
	West Moors	0.0%	0.0%	0.0%	0.0%	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%	0.1%		
	Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.0%	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
	West Parley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 East Dorset	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.3%	0.0%	0.2%	1.7%	0.8%	0.9%	0.4%	1.5%	0.1%	0.6%	0.3%			
	Eastern Dorset Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	4.1%	1.1%	0.8%	22.6%	23.0%	1.4%	3.1%	6.0%	0.3%	3.8%	5.5%			
Purbeck Area	Purbeck (District)	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.6%	1.3%		
	Swanage	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
	Wareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	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%	0.1%		
	Purbeck Area Total	0.0%	0.0%	0.0%	0.0%	0.0%	12.2%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.7%	1.4%			
Sub-Total: Within Dorset Unitary Area																											
		87.6%	89.8%	84.5%	55.2%	86.2%	25.7%	81.5%	49.0%	32.8%	36.3%	47.2%	53.6%	1.4%	4.3%	1.3%	0.8%	22.6%	23.5%	1.4%	3.3%	6.9%	0.4%	23.3%	48.2%		
OUTSIDE DORSET UNITARY AUTHORITY AREA																											
	Bournemouth	1.7%	0.6%	4.2%	0.3%	1.1%	9.6%	1.8%	0.8%	1.6%	3.0%	2.7%	3.5%	79.2%	58.4%	55.3%	37.0%	53.3%	17.9%	22.3%	17.4%	31.0%	15.6%	27.2%	11.2%		
	Christchurch	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	1.1%	31.8%	48.9%	0.8%	0.0%	0.4%	1.2%	12.3%	13.4%	5.5%	0.1%		
	Poole	5.2%	4.7%	7.1%	1.4%	7.0%	53.0%	6.3%	1.4%	3.2%	16.6%	8.0%	33.6%	10.9%	32.5%	6.2%	2.1%	10.9%	51.5%	70.4%	74.6%	5.8%	2.1%	24.3%	19.0%		
	All Others	5.5%	4.9%	4.0%	43.2%	5.7%	11.7%	10.4%	48.8%	62.4%	44.1%	42.1%	9.4%	3.4%	3.7%	5.4%	11.2%	12.4%	7.1%	5.5%	3.5%	44.0%	68.5%	19.8%	21.5%		
Sub-Total: Outside Dorset Unitary Area																											
		12.4%	10.2%	15.5%	44.8%	13.8%	74.3%	18.5%	51.0%	67.2%	63.7%	52.8%	46.4%	98.6%	95.7%	98.7%	99.2%	77.4%	76.5%	98.6%	96.7%	93.1%	99.6%	76.7%	51.8%		
Total																											
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		

Notes: Market Shares derived from convenience goods market patterns (in £m) from:
 Market Shares derived from convenience goods market patterns (in £m) from:
 • Joint Retail And Commercial Leisure Study (2018) for North Dorset District Council, West Dorset District Council, and Weymouth & Portland Borough Council; and
 • Joint Retail and Leisure Study (2017) for Bournemouth Borough Council and Christchurch and East Dorset Councils.

TABLE 2: 2022 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 - 22	Representative DC Area (Zones 1-12 ; 17,18)			
WITHIN DORSET UNITARY AUTHORITY AREA																											
Western Dorset Area	Dorchester	£2.5	£15.2	£11.4	£11.1	£47.6	£15.3	£26.1	£10.5	£2.1	£0.6	£0.1	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£144.9	£144.9	
	Bridport	£0.0	£0.0	£0.2	£48.6	£0.1	£0.0	£0.0	£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	£54.2	£54.2	
	Lyme Regis	£0.0	£0.0	£0.0	£4.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.8	£4.8	
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8	£25.7	£0.3	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.1	£28.1	
	Beaminster	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£1.7	£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	£2.0	£2.0	
	All Smaller Villages / Local Centres	£0.0	£0.3	£0.5	£0.7	£0.4	£0.2	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9	
	All Out-of-Centre	£0.0	£0.7	£1.2	£1.9	£5.1	£2.7	£2.2	£0.5	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.8	£14.8	
	Western Dorset Total	£2.5	£16.3	£13.3	£67.4	£53.2	£18.2	£29.3	£19.0	£27.9	£1.0	£0.3	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£251.6	£251.6	
Weymouth & Portland Area	Weymouth	£23.9	£94.6	£20.2	£0.2	£4.7	£1.5	£2.3	£0.5	£0.3	£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	£148.5	£148.5	
	Portland, Easton	£5.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.8	£5.8	
	Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	
	All Smaller Villages / Local Centres	£0.1	£3.7	£0.4	£0.0	£0.2	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6	£4.6	
	All Out-of-Centre	£0.8	£21.1	£6.9	£0.1	£1.8	£1.0	£2.0	£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	£0.0	£0.0	£33.9	£33.9	
	Weymouth & Portland Total	£30.5	£119.9	£27.5	£0.3	£6.7	£2.5	£4.3	£0.7	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£193.0	£193.0	
Northern Dorset Area	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.3	£0.0	£1.6	£3.3	£0.6	£49.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£55.8	£55.8	
	Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£15.6	£3.9	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£22.6	£22.6	
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£5.0	£30.2	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£37.2	£37.2	
	Sturminster Newton	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£2.5	£8.4	£0.2	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.3	£13.3	
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£2.6	
	All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5	
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.8	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3	
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.4	£0.1	£0.2	£0.3	£0.0	£9.8	£33.6	£35.7	£56.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£139.2	£137.3
Eastern Dorset	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£2.4	£0.9	£0.2	£26.9	£1.8	£0.6	£0.5	£0.5	£0.5	£0.5	£35.6	£28.8		
	Verwood	£0.0	£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	£0.2	£7.8	£0.1	£0.0	£0.0	£0.8	£0.0	£0.0	£9.4	£8.0		
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£3.5	£0.5	£0.2	£3.2	£30.6	£0.8	£4.0	£6.1	£0.0	£50.7	£34.7		
	West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1		
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£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	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1		
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£8.0	£0.0	£0.2	£3.2	£1.2	£2.5	£0.7	£2.5	£0.3	£19.7	£4.4			
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£14.3	£1.4	£0.9	£42.2	£33.8	£3.9	£5.1	£9.8	£0.8	£116.6	£77.1		
Purbeck Area	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£18.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£19.5	£18.4			
	Swanage	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1		
	Wareham	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£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	£1.5	£1.5		
	Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£19.9	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£21.1	£20.0			
Sub-Total: Within Dorset Unitary area		£32.9	£136.2	£40.9	£68.1	£60.03	£42.0	£34.0	£19.6	£38.0	£34.5	£36.2	£59.8	£3.3	£15.0	£1.7	£0.9	£42.2	£34.5	£3.9	£5.5	£11.3	£1.0	£721.6	£679.0		
OUTSIDE DORSET UNITARY AUTHORITY AREA																											
	Bournemouth	£0.6	£1.0	£2.0	£0.3	£0.8	£15.7	£0.7	£0.3	£1.9	£2.9	£2.1	£3.9	£185.5	£203.9	£72.1	£40.2	£99.5	£26.3	£62.9	£28.7	£50.7	£40.8	£842.8	£158.0		
	Christchurch	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.9	£3.8	£41.4	£53.2	£1.5	£0.0	£1.1	£2.0	£20.1	£35.0	£170.3	£1.6		
	Poole	£1.9	£7.2	£3.4	£1.7	£4.8	£86.5	£2.6	£0.5	£3.7	£15.8	£6.2	£37.5	£25.5	£113.4	£8.1	£2.3	£20.4	£75.7	£198.7	£123.1	£9.5	£5.5	£754.1	£268.0		
	All Others	£2.1	£7.4	£1.9	£53.3	£4.0	£19.0	£4.3	£19.5	£72.3	£42.0	£32.3	£10.5	£8.0	£12.9	£7.0	£12.2	£23.2	£10.4	£15.5	£5.8	£71.9	£179.1	£614.6	£302.2		
Sub-Total: Outside Dorset Unitary area		£4.6	£15.5	£7.5	£55.3	£9.58	£121.2	£7.7	£20.4	£77.8	£60.7	£40.5	£51.9	£231.0	£334.0	£128.6	£107.9	£144.5	£112.4	£278.3	£159.6	£152.2	£260.4	£2,381.8	£729.8		
Total		£37.6	£151.7	£48.4	£123.5	£69.6	£163.2	£41.7	£40.1	£115.9	£95.2	£76.7	£111.7														

TABLE 3: 2025 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
 ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																									
Western Dorset Area																									
Dorchester	£2.8	£17.1	£13.7	£12.5	£56.6	£17.8	£30.9	£12.0	£2.4	£0.7	£0.1	£2.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£169.4	£169.4
Bridport	£0.0	£0.0	£0.3	£54.5	£0.1	£0.0	£0.0	£6.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£60.9	£60.9
Lyme Regis	£0.0	£0.0	£0.0	£5.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.4	£5.4
Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.9	£28.9	£0.4	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£31.7	£31.7
Beaminsters	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£2.2
All Smaller Villages / Local Centres	£0.0	£0.4	£0.6	£0.8	£0.5	£0.2	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£3.3
All Out-of-Centre	£0.0	£0.8	£1.4	£2.1	£6.0	£3.2	£2.6	£0.6	£0.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£17.3	£17.3
Western Dorset Total	£2.8	£18.3	£16.0	£75.6	£63.3	£21.2	£34.8	£21.7	£31.3	£1.1	£0.4	£3.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£290.2	£290.2
Weymouth & Portland Area																									
Weymouth	£27.3	£106.6	£24.3	£0.2	£5.6	£1.7	£2.8	£0.6	£0.4	£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	£169.6	£169.6
Portland, Easton	£6.2	£0.5	£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	£0.0	£0.0	£6.7	£6.7
Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3
All Smaller Villages / Local Centres	£0.1	£4.2	£0.5	£0.0	£0.3	£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	£0.0	£0.0	£0.0	£0.0	£5.2	£5.2
All Out-of-Centre	£0.9	£23.8	£8.3	£0.1	£2.1	£1.2	£2.4	£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	£0.0	£0.0	£38.9	£38.9
Weymouth & Portland Total	£34.8	£135.0	£33.1	£0.4	£8.0	£2.9	£5.1	£0.7	£0.4	£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	£0.0	£220.8	£220.8
Northern Dorset Area																									
Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£1.8	£3.8	£0.7	£56.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£63.5	£63.5
Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£18.2	£4.4	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.1	£26.1
Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£5.8	£33.9	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£42.0	£42.0
Sturminster Newton	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£2.8	£9.9	£0.2	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£15.3	£15.3
Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.6
All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.8	£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	£4.9	£4.9
Northern Dorset Total	£0.0	£0.0	£0.0	£0.5	£0.1	£0.3	£0.4	£0.0	£11.1	£39.2	£40.1	£64.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.9	£0.0	£0.2	£1.6	£0.0	£158.5	£156.5	
Eastern Dorset																									
Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£2.6	£1.0	£0.2	£29.5	£2.1	£0.6	£0.5	£0.5	£0.5	£0.5	£38.9	£31.7	
Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.2	£8.6	£0.2	£0.0	£0.0	£0.9	£0.0	£0.0	£10.3	£8.8	
Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£3.7	£0.6	£0.2	£3.5	£35.9	£0.9	£4.2	£6.5	£0.0	£0.0	£57.6	£40.5	
West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2	
Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£8.5	£0.0	£0.2	£3.5	£1.4	£2.7	£0.7	£2.6	£0.3	£21.2	£4.9	£21.2	£4.9
Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£3.5	£15.2	£1.5	£0.9	£46.3	£39.7	£4.2	£5.5	£10.6	£0.8	£129.4	£87.3		
Purbeck Area																									
Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£21.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£22.5	£21.4		
Wareham	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
Wool	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£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	£1.7	£1.7	
Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.0	£23.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£24.4	£23.2		
Sub-Total: Within Dorset Unitary area	£37.6	£153.3	£49.1	£76.4	£71.4	£48.7	£40.3	£22.5	£42.8	£40.3	£40.6	£67.9	£3.5	£15.9	£1.8	£0.9	£46.3	£40.6	£4.2	£5.8	£12.1	£1.1	£823.2	£777.9	
OUTSIDE DORSET UNITARY AUTHORITY AREA																									
Bournemouth	£0.7	£1.1	£2.4	£0.4	£0.9	£18.2	£0.9	£0.4	£2.1	£3.3	£2.3	£4.5	£196.0	£216.2	£76.6	£42.8	£109.2	£30.9	£66.8	£30.7	£54.5	£43.1	£904.1	£177.4	
Christchurch	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.6	£4.1	£44.1	£56.6	£1.6	£0.0	£1.2	£2.1	£21.6	£37.1	£181.1	£1.8	
Poole	£2.2	£8.1	£4.1	£1.9	£5.8	£100.4	£3.1	£0.6	£4.2	£18.5	£6.9	£42.6	£27.0	£120.3	£8.6	£2.4	£22.3	£88.9	£211.0	£131.5	£10.2	£5.8	£826.4	£309.7	
All Others	£2.4	£8.3	£2.3	£59.8	£4.7	£22.1	£5.1	£22.4	£81.2	£49.0	£36.2	£11.9	£8.4	£13.7	£7.5	£13.0	£25.4	£12.2	£16.5	£6.2	£77.4	£189.4	£675.2	£343.2	
Sub-Total: Outside Dorset Unitary area	£5.3	£17.5	£9.0	£62.0	£11.4	£140.7	£9.2	£23.4	£87.5	£70.8	£45.4	£58.9	£244.0	£354.2	£136.8	£114.8	£158.7	£132.1	£295.5	£170.4	£163.8	£275.4	£2,586.9	£832.0	
Total	£43.0	£170.8	£58.1	£138.4	£82.8	£189.5	£49.5	£45.9	£130.3	£111.1	£86.0	£126.9	£247.4	£370											

TABLE 4: 2030 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1-22	Representative DC Area (Zones 1-12 ; 17,18)		
WITHIN DORSET UNITARY AUTHORITY AREA																										
Western Dorset Area																										
Dorchester	£3.2	£20.0	£15.3	£14.7	£61.1	£20.1	£32.8	£13.4	£2.6	£0.8	£0.1	£3.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£187.4	£187.4	
Bridport	£0.0	£0.0	£0.3	£64.3	£0.1	£0.0	£0.0	£6.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£71.5	£71.5	
Lyme Regis	£0.0	£0.0	£0.0	£6.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.4	£6.4
Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£1.0	£32.0	£0.4	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£35.1	£35.1	
Beaminstor	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£2.2	£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	£2.5	£2.5	
All Smaller Villages / Local Centres	£0.0	£0.4	£0.7	£1.0	£0.6	£0.2	£0.5	£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	£3.7	£3.7	
All Out-of-Centre	£0.0	£1.0	£1.6	£2.5	£6.5	£3.6	£2.8	£0.7	£0.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£19.2	£19.2	
Western Dorset Total	£3.2	£21.4	£17.9	£89.2	£68.3	£23.9	£37.0	£24.3	£34.7	£1.3	£0.4	£4.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£325.7	£325.7	
Weymouth & Portland Area																										
Weymouth	£31.2	£124.7	£27.1	£0.3	£6.1	£2.0	£2.9	£0.7	£0.4	£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	£195.6	£195.6
Portland, Easton	£7.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.7	£7.7
Portland, Fortuneswell	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3
All Smaller Villages / Local Centres	£0.2	£4.9	£0.6	£0.0	£0.3	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£6.0	£6.0
All Out-of-Centre	£1.0	£27.8	£9.3	£0.1	£2.3	£1.4	£2.5	£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	£0.0	£0.0	£0.0	£44.6	£44.6
Weymouth & Portland Total	£39.9	£158.0	£36.9	£0.4	£8.6	£3.3	£5.5	£0.8	£0.4	£0.0	£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	£254.2	£254.2	
Northern Dorset Area																										
Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£1.9	£4.3	£0.8	£64.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£71.6	£71.6
Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£20.7	£4.8	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£29.4	£29.4
Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£6.6	£37.3	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£46.3	£46.3
Sturminster Newton	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£3.1	£11.2	£0.3	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£17.3	£17.3
Stalbridge	£0.0	£0.0	£0.0	£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	£0.0	£3.2	£3.2
All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£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	£0.7	£0.7
All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.9	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.5	£5.5
Northern Dorset Total	£0.0	£0.0	£0.0	£0.6	£0.1	£0.3	£0.4	£0.0	£12.3	£44.4	£44.1	£72.2	£0.0	£0.0	£0.3	£0.0	£0.0	£0.9	£0.0	£0.2	£1.8	£0.0	£0.0	£177.6	£177.6	
Eastern Dorset																										
Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£2.9	£1.1	£0.3	£33.0	£2.2	£0.7	£0.6	£0.6	£0.6	£0.6	£43.5	£35.3	
Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£9.6	£0.2	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£11.5	£9.8	
Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£4.2	£0.6	£0.3	£3.9	£38.2	£1.0	£4.8	£7.3	£0.0	£0.0	£62.6	£43.3	
West Moors	£0.0	£0.0	£0.0	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£1.4	
Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	
West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£9.6	£0.0	£0.3	£3.9	£1.5	£3.0	£0.8	£3.0	£0.3	£0.3	£23.7	£5.4	£23.7	£5.4
Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£17.1	£1.7	£1.0	£51.8	£42.2	£4.7	£6.2	£11.8	£0.9	£142.8	£95.4		
Purbeck Area																										
Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£24.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£0.0	£25.4	£24.1	
Wareham	£0.0	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
Wool	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£2.0	
Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.0	£26.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.3	£0.0	£27.5	£26.2	
Sub-Total: Within Dorset Unitary Area																										
	£43.1	£179.4	£54.8	£90.2	£77.1	£55.0	£42.8	£25.1	£47.3	£45.7	£44.6	£76.7	£3.9	£17.9	£2.0	£1.0	£51.8	£43.2	£4.7	£6.6	£13.6	£1.2	£927.8	£876.8		
OUTSIDE DORSET UNITARY AUTHORITY AREA																										
Bournemouth	£0.8	£1.3	£2.7	£0.4	£1.0	£20.5	£0.9	£0.4	£2.4	£3.8	£2.5	£5.0	£220.1	£243.7	£86.6	£48.4	£122.1	£32.9	£75.2	£34.6	£61.2	£48.2	£1,014.5	£196.8		
Christchurch	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.2	£4.6	£49.8	£63.9	£1.8	£0.0	£1.3	£2.4	£24.3	£41.4	£203.8	£2.0		
Poole	£2.5	£9.5	£4.6	£2.2	£6.2	£113.3	£3.3	£0.7	£4.6	£20.9	£7.6	£48.1	£30.3	£135.6	£9.7	£2.7	£25.0	£94.6	£237.3	£148.2	£11.4	£6.5	£924.9	£343.1		
All Others	£2.7	£9.7	£2.6	£70.6	£5.1	£24.9	£5.5	£25.0	£90.0	£55.6	£39.8	£13.4	£9.5	£15.4	£8.5	£14.6	£2									

TABLE 5: 2035 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 -22	Representative DC Area (Zones 1-12 ; 17,18)	
WITHIN DORSET UNITARY AUTHORITY AREA																										
Western Dorset Area	Dorchester	£3.5	£21.6	£16.9	£16.4	£74.6	£22.4	£38.5	£15.3	£3.1	£0.9	£0.1	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£216.7	£216.7
	Bridport	£0.0	£0.0	£0.3	£71.5	£0.2	£0.0	£0.0	£7.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£79.6	£79.6
	Lyme Regis	£0.0	£0.0	£0.0	£7.1	£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	£0.0	£7.1	£7.1
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£1.1	£37.8	£0.5	£0.1	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£41.3	£41.3
	Beaminster	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
	All Smaller Villages / Local Centres	£0.0	£0.4	£0.8	£1.1	£0.7	£0.3	£0.6	£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	£4.2	£4.2
	All Out-of-Centre	£0.0	£1.0	£1.7	£2.8	£7.9	£4.0	£3.3	£0.8	£0.0	£0.0	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£22.2	£22.2
	Western Dorset Total	£3.5	£23.1	£19.7	£99.1	£83.4	£26.7	£43.4	£27.7	£41.0	£1.4	£0.4	£4.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£373.9	£373.9	
Weymouth & Portland Area	Weymouth	£33.6	£134.4	£29.8	£0.3	£7.4	£2.2	£3.4	£0.8	£0.5	£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	£0.0	£212.6	£212.6
	Portland, Easton	£7.6	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2	£8.2
	Portland, Fortuneswell	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4
	All Smaller Villages / Local Centres	£0.2	£5.2	£0.6	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.6	£6.6
	All Out-of-Centre	£1.1	£30.0	£10.2	£0.2	£2.8	£1.5	£3.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£48.9	£48.9
	Weymouth & Portland Total	£42.9	£170.2	£40.7	£0.5	£10.5	£3.7	£6.4	£1.0	£0.5	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£276.7	£276.7	
Northern Dorset Area	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.5	£0.0	£2.3	£4.7	£0.9	£70.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£78.7	£78.7
	Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£22.4	£5.3	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£32.2	£32.2
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£7.1	£41.3	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£51.2	£51.2
	Sturminster Newton	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£3.6	£12.1	£0.3	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£19.1	£19.1
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.8	£3.8
	All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£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	£0.8	£0.8
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£1.0	£3.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.1	£6.1
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.6	£0.2	£0.3	£0.5	£0.0	£14.5	£48.1	£48.8	£79.2	£0.0	£0.0	£0.4	£0.0	£0.0	£1.0	£0.0	£0.2	£2.0	£0.0	£195.9	£195.9	
Eastern Dorset	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£3.3	£1.2	£0.3	£37.3	£2.5	£0.8	£0.7	£0.7	£0.7	£0.7	£49.2	£40.0	
	Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.3	£10.9	£0.2	£0.0	£0.0	£1.1	£0.0	£0.0	£13.0	£11.1	
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£4.7	£0.7	£0.3	£4.4	£43.4	£1.1	£5.5	£8.3	£0.0	£0.0	£71.1	£49.2	
	West Moors	£0.0	£0.0	£0.0	£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	£1.6	£1.6	
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£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 East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£10.9	£0.0	£0.3	£4.4	£1.7	£3.5	£0.9	£3.4	£0.4	£26.9	£6.1	£6.1	
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£19.4	£2.0	£1.2	£58.6	£48.0	£5.4	£7.1	£13.5	£1.0	£162.1	£108.1	
Purbeck Area	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£26.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.4	£0.0	£28.5	£26.9	
	Wareham	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	
	Wool	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£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	£2.2	£2.2	
	Purbeck Area Total	£0.0	£0.0	£0.0	£0.0	£0.0	£29.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.4	£30.8	£29.3		
Sub-Total: Within Dorset Unitary area		£46.4	£193.3	£60.4	£100.2	£94.1	£61.5	£50.3	£28.7	£55.9	£49.4	£49.4	£84.1	£4.4	£20.4	£2.3	£1.2	£58.6	£49.0	£5.4	£7.5	£15.5	£1.4	£1,039.4	£981.3	
OUTSIDE DORSET UNITARY AUTHORITY AREA																										
	Bournemouth	£0.9	£1.3	£3.0	£0.5	£1.2	£23.0	£1.1	£0.5	£2.8	£4.1	£2.8	£5.5	£249.7	£276.7	£99.0	£55.3	£138.1	£37.3	£85.8	£39.6	£69.7	£54.7	£1,152.6	£222.1	
	Christchurch	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£16.1	£5.2	£56.9	£73.2	£2.1	£0.0	£1.5	£2.7	£27.7	£46.9	£0.0	£232.4	£2.2	
	Poole	£2.7	£10.2	£5.0	£2.5	£7.6	£126.7	£3.9	£0.8	£5.4	£22.7	£8.4	£52.7	£34.4	£154.0	£11.1	£3.1	£28.3	£107.4	£270.9	£169.8	£13.0	£7.4	£1,048.0	£384.4	
	All Others	£2.9	£10.5	£2.8	£78.4	£6.2	£27.9	£6.4	£28.5	£106.3	£60.1	£44.1	£14.7	£10.7	£17.5	£9.7	£16.8	£32.2	£14.8	£21.2	£7.9	£99.0	£240.0	£858.6	£435.9	
	Sub-Total: Outside Dorset Unitary area	£6.5	£22.0	£11.0	£81.4	£15.0	£177.6	£11.4	£29.8	£114.5	£86.9	£55.3	£72.9	£310.9	£453.4	£176.6	£148.4	£200.6	£159.6	£379.4	£220.0	£209.4	£348.9	£3,291.7	£1,044.7	
Total		£52.9	£215.4	£71.4	£181.6	£109.1	£239.1	£61.7	£58.5	£170.4	£136.3	£104.8	£157.1	£315.3	£473.7	£178.9	£149.6	£259.2	£208.6	£384.8	£227.6	£224.9	£350.3	£4,331.1	£2,025.9	

TABLE 6: 2040 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	Study Area Zones 1 - 22	Representative DC Area (Zones 1-12 ; 17,18)		
WITHIN DORSET UNITARY AUTHORITY AREA																											
Western Dorset Area	Dorchester	£4.0	£24.5	£19.2	£18.8	£88.2	£26.1	£44.4	£18.2	£3.6	£1.0	£0.2	£4.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£252.0	£252.0	
	Bridport	£0.0	£0.0	£0.4	£82.1	£0.2	£0.0	£0.0	£9.1	£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	£91.7	£91.7
	Lyme Regis	£0.0	£0.0	£0.0	£8.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2	£8.2
	Sherborne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.3	£43.8	£0.5	£0.2	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£47.7	£47.7
	Beaminstor	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£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	£0.0	£0.0	£0.0	£3.4	£3.4
	All Smaller Villages / Local Centres	£0.0	£0.5	£0.9	£1.2	£0.8	£0.3	£0.7	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.9	£4.9
	All Out-of-Centre	£0.0	£1.2	£2.0	£3.2	£9.4	£4.6	£3.8	£0.9	£0.0	£0.0	£0.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£25.8	£25.8
	Western Dorset Total	£4.0	£26.2	£22.4	£113.8	£98.6	£31.0	£50.0	£32.9	£47.4	£1.5	£0.5	£5.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£433.7	£433.7	
	Weymouth & Portland Area	Weymouth	£39.1	£152.4	£33.8	£0.4	£8.8	£2.6	£4.0	£0.9	£0.6	£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	£0.0	£242.8	£242.8
		Portland, Easton	£8.9	£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	£0.0	£0.0	£0.0	£0.0	£9.6	£9.6
Portland, Fortuneswell		£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4
All Smaller Villages / Local Centres		£0.2	£6.0	£0.7	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.5	£7.5
All Out-of-Centre		£1.3	£34.0	£11.6	£0.2	£3.3	£1.8	£3.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£55.8	£55.8
Weymouth & Portland Total		£49.9	£193.1	£46.2	£0.5	£12.5	£4.3	£7.4	£1.1	£0.6	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£316.0	£316.0	
Northern Dorset Area	Blandford Forum	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.5	£0.0	£2.7	£5.2	£1.0	£82.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£91.8	£91.8	
	Gillingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6	£24.7	£6.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£36.1	£36.1	
	Shaftesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£7.8	£47.6	£2.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£58.7	£58.7	
	Sturminster Newton	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£4.2	£13.3	£0.3	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£21.4	£21.4	
	Stalbridge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£4.4	
	All Smaller Villages / Local Centres	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	
	All Out-of-Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£1.2	£4.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.0	£7.0	
	Northern Dorset Total	£0.0	£0.0	£0.0	£0.7	£0.2	£0.4	£0.5	£0.0	£16.7	£53.0	£56.3	£92.8	£0.0	£0.0	£0.4	£0.0	£0.0	£1.2	£0.0	£0.3	£2.3	£0.0	£224.9	£221.9		
Eastern Dorset	Ferndown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£3.8	£1.4	£0.3	£43.3	£3.0	£0.9	£0.8	£0.8	£0.8	£0.8	£57.0	£46.4		
	Verwood	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.3	£12.6	£0.2	£0.0	£0.0	£1.3	£0.0	£15.0	£12.9		
	Wimborne	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£5.4	£0.8	£0.3	£5.1	£51.5	£1.3	£6.3	£9.6	£0.0	£83.5	£58.2		
	West Moors	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.8	
	Corfe Mullen	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	
	West Parley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£3.9	£0.4	£0.0	£0.0	
	Other East Dorset	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£12.5	£0.0	£0.3	£5.1	£2.0	£4.0	£1.1	£3.9	£0.4	£31.0	£7.1	£7.1		
	Eastern Dorset Total	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£5.0	£22.2	£2.3	£1.4	£67.9	£56.9	£6.2	£8.2	£15.6	£1.2	£188.7	£126.7			
	Purbeck Area	Purbeck (District)	£0.0	£0.0	£0.0	£0.0	£0.0	£31.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.4	£33.1	£31.3		
		Wareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	
Wool		£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£2.6		
Purbeck Area Total		£0.0	£0.0	£0.0	£0.0	£0.0	£33.9	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.4	£35.8	£34.1			
Sub-Total: Within Dorset Unitary area		£53.9	£219.3	£68.6	£115.0	£111.2	£71.5	£57.9	£34.1	£64.7	£54.5	£56.9	£98.6	£5.0	£23.3	£2.7	£1.4	£67.9	£58.2	£6.2	£8.7	£18.0	£1.6	£1,199.1	£1,132.3		
OUTSIDE DORSET UNITARY AUTHORITY AREA																											
	Bournemouth	£1.1	£1.5	£3.4	£0.5	£1.4	£26.7	£1.3	£0.6	£3.2	£4.5	£3.2	£6.5	£285.1	£316.1	£113.8	£63.7	£160.1	£44.3	£98.7	£45.7	£80.7	£62.3	£1,324.6	£258.4		
	Christchurch	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£18.4	£5.9	£65.4	£84.3	£2.4	£0.0	£1.8	£3.2	£32.0	£53.5	£267.1	£2.6	£267.1		
	Poole	£3.2	£11.6	£5.7	£2.8	£9.0	£147.4	£4.5	£0.9	£6.3	£25.0	£9.7	£61.8	£39.2	£175.9	£12.8	£3.6	£32.8	£127.5	£311.5	£196.2	£15.1	£8.4	£1,210.8	£448.1		
	All Others	£3.4	£11.9	£3.2	£90.0	£7.3	£32.4	£7.4	£33.9	£122.9	£66.3	£50.8	£17.2	£12.3	£20.0	£11.1	£19.3	£37.3	£17.5	£24.4	£9.2	£114.6	£273.6	£986.2	£501.7		
Sub-Total: Outside Dorset Unitary area		£7.6	£25.0	£12.5	£93.4	£17.8	£206.5	£13.2	£35.4	£132.4	£95.8	£63.7	£85.5	£355.0	£518.0	£203.1	£170.9	£232.6	£189.4	£436.3	£254.2	£242.4	£397.8	£3,788.7	£1,210.8		
Total		£61.5	£244.3	£81.1	£208.4	£129.0	£278.0	£71.1	£69.5	£197.1	£150.3	£120.7	£184.0	£360.0	£541.3	£205.8	£172.3	£300.5	£247.6	£442.5	£262.9	£260.4	£399.4	£4,987.9	£2,343.2		

APPENDIX 13:

Composite Scenario: Comparison Goods: Capacity

TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)
 Excluding SFT & 'Inflow' from outside Study Area

	2022	2025	2030	2035	2040
Western Dorset Area	£251.6	£290.2	£325.7	£373.9	£433.7
Weymouth & Portland Area	£193.0	£220.8	£254.2	£276.7	£316.0
Northern Dorset Area	£139.2	£158.5	£177.6	£195.9	£224.9
Eastern Dorset	£116.6	£129.4	£142.8	£162.1	£188.7
Purbeck Area	£21.1	£24.4	£27.5	£30.8	£35.8
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:	£721.6	£823.2	£927.8	£1,039.4	£1,199.1

TABLE 2 ALL COMPARISON GOODS - TOTAL TURNOVER
 Including 'Inflow' from outside Study Area

	Estimated 'Inflow' from outside Study Area	2022	2025	2030	2035	2040
Western Dorset Area	5%	£264.9	£305.4	£342.9	£393.6	£456.6
Weymouth & Portland Area	5%	£203.2	£232.4	£267.5	£291.3	£332.6
Northern Dorset Area	5%	£146.6	£166.8	£186.9	£206.2	£236.8
Eastern Dorset	5%	£122.7	£136.2	£150.3	£170.6	£198.6
Purbeck Area	3%	£21.8	£25.2	£28.4	£31.8	£36.9
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN DORSET UNITARY AREA:		£759.1	£866.0	£976.0	£1,093.4	£1,261.5

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE

	CENTRE	PLANNING REF	LOCATION	Gross Floorspace (sq m)	Net Floorspace (sq m)	2022 Average Sales Density (£ per sqm)	FORECAST TURNOVER (£M)				
							2021	2025	2030	2035	2040
[1]	Bradford Abbas Parish (Out-of-Centre)	WD/D/16/000486	Land adj. Unit 4, Peel Centre, Babylon Hill, Yeovil	N/A	1,326	6,500	£8.6	£9.2	£10.5	£12.1	£14.0
[2]	Bradford Abbas Parish (Out-of-Centre)	WD/D/16/001406	Peel Centre Retail Park, Babylon Hill, Yeovil	207	145	6,500	£0.9	£1.0	£1.1	£1.3	£1.5
[3]	Shaftesbury (Out-of-Centre)	P/FUL/2020/000008	Former Cattle Market Christys Lane Shaftesbury Dorset SP7 8PH	2,089	813	6,500	£5.3	£5.7	£6.4	£7.4	£8.6
[4]	Blandford Forum (Out-of-Centre)	P/FUL/2021/001110	Unit 2 Glenmore Business Park, Shaftesbury Lane, Blandford Foru, DT11 7FP	333	266	6,500	£1.7	£1.9	£2.1	£2.4	£2.8
[5]	Wimborne (Out-of-Centre)	3/21/0013/FUL	Jades Farm, Furzehill, Colehill, Wimborne, BH21 4HB	809	647	6,500	£4.2	£4.5	£5.1	£5.9	£6.8
[6]	West Parley (Out-of-Centre)	3/17/3609/OUT	Land East of New Road, West Parley, Dorset	3,200	1,252	6,500	£8.1	£8.7	£9.9	£11.4	£13.2
[7]	Wimborne Minster (Out-of-Centre)	3/14/0016/OUT	East and West of Cranborne Road, Burts Hill, Wimborne.	1,400	224	6,500	£1.5	£1.6	£1.8	£2.0	£2.4
[8]	Littlemoor (Out-of-Centre)	WP/16/00253/OUT	Lands to north of Littlemoor Road, Weymouth	850	136	6,500	£0.9	£0.9	£1.1	£1.2	£1.4
TOTAL					4,809		£31.3	£33.5	£38.1	£43.9	£50.7

Notes:

- [1] WD/D/16/000486: Erection of retail warehouse unit for unrestricted A1 Non-food retail use. Total area of 1,895 sqm net of which maximum convenience goods floorspace is 569 sqm net and comparison goods floorspace is 1,326 sqm net.
- [2] WD/D/16/001406: Erection of an ancillary pod building inc. 2 no. A1/ A3/ A5 use units. Gross floor area of 207 sqm with assumed gross to net floorspace ratio of 70%. Assumed that net floorspace of 145 sqm will be for comparison goods only.
- [3] P/FUL/2020/000008: Erection of retail foodstore with associated car parking, access, landscaping and engineering works. Officers report indicates an internal sales area of 1,161sqm net. Assumed that of this floorspace 70% will be for convenience goods and 30% for comparison goods.
- [4] P/FUL/2021/001110: Enclosure of the existing retail yard to provide a Class E/B8 unit and insertion of roller shutter doors into the front elevation. The application is for the enclosure of the existing retail yard to provide a Class E/B8 unit comprising 333 sqm (assumed gross). The existing retail yard and adjacent retail unit are currently occupied by ScrewFix, and the additional internal floorspace is proposed to be occupied by ScrewFix. This has been netted down by 80% to 266 sqm net and for comparison goods only.
- [5] 3/21/0013/FUL: Change of use from greenhouse to retail unit and erect an entrance porch to the western elevation. The gross floorspace of some 809sqm net has been netted down to 647 sqm net assuming a gross to net ratio of 80%. It is assumed that this will be for comparison goods only i.e. gardening.
- [6] 3/17/3609/OUT: Outline application (All matters reserved except for access and associated link road); with up to 386 dwellings (Class C3); up to 1000sqm of retail units (Classes A1-A5); up to 900sqm of offices (Class B1) and up to 2200sqm of foodstore (Class A1); together with accesses, a link road and associated highway works, public open space including SANG, allotments, landscaping and associated works. In relation to the 2,200sqm gross foodstore (a 80% gross to net ratio has been applied and of which 80% is assumed for convenience goods and 20% for comparison goods) floorspace. Additionally based on the floorspace of 1,000 sqm gross for the retail units (a 90% gross to net ratio has been applied) and assumed for comparison goods floorspace only).
- [7] 3/14/0016/OUT - Residential development of up to 630 dwellings, a new local centre, a replacement and extended Wimborne First School, public open space and new allotments together with new access, streets and other related infrastructure (All Matters Reserved). The Council has provided a gross floorspace estimate of some 1,400sqm. This has been netted down to 1,120 sqm net assuming a gross to net ratio of 80%. It is assumed that of this net total 80% will be for convenience goods (896 sqm net) and the remainder (20%) or 224 sqm net will be for comparison goods only.
- [8] WP/16/00253/OUT - Outline application for a mixed use development comprising: up to 500 dwellings, including affordable housing; up to 8 ha of employment land (to include a new hotel, residential care home, car show rooms and other employment land); land for a new primary school; a new local centre; public open spaces, new accesses and roads, and associated infrastructure. The Council has provided a gross floorspace estimate of some 850sqm net has been netted down to 680 sqm net assuming a gross to net ratio of 80%. Of this it is assumed that 80% will be for convenience goods (544 sqm net) and the remainder (20%) or 136 sqm net will be for comparison goods only.

TABLE 4: DORSET UNITARY AUTHORITY AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2022	2025	2030	2035	2040
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£759.1	£866.0	£976.0	£1,093.4	£1,261.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£759.1	£813.5	£924.9	£1,067.0	£1,230.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£52.6	£51.2	£26.4	£30.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£33.5	£38.1	£43.9	£50.7
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	£19.1	£13.1	-£17.5	-£20.2
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,500	£6,966	£7,919	£9,136	£10,540
	(ii) Net Floorspace Capacity (sq m):	-	2,735	1,651	-1,917	-1,913
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		3,907	2,358	-2,739	-2,733

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 2).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 19 (January 2022) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 3. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2025.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: SUMMARY TABLE - COMPARISON GOODS CAPACITY ASSESSMENT (NET SQ M)
Assume Equilibrium at 2022 and Constant Market Shares

	2025	2030	2035	2040
TOTAL DORSET UNITARY AREA WIDE COMPARISON GOODS CAPACITY	2,735	1,651	-1,917	-1,913

TABLE 6: DORSET - COMPARISON GOODS CAPACITY ASSESSMENT BY CENTRE AND UNITARY AUTHORITY AREA (sqm net)

	2025	2030	2035	2040
Western Dorset Area				
Dorchester	2,126	1,441	1,496	1,703
Bridport	426	727	401	387
Lyme Regis	36	68	36	32
Sherborne	235	110	203	218
Beaminster	21	17	13	21
All Smaller Villages / Local Centres	39	33	25	25
All Out-of-Centre	218	152	160	183
Sub-Total	3,101	2,549	2,334	2,568
Weymouth & Portland Area				
Weymouth	1,592	1,948	455	200
Portland, Easton	62	71	3	8
Portland, Fortuneswell	3	3	0	0
All Smaller Villages / Local Centres	45	60	14	4
All Out-of-Centre	265	307	14	-51
Sub-Total	1,967	2,389	486	162
Northern Dorset Area				
Blandford Forum	554	476	24	129
Gillingham	281	238	49	-63
Shaftesbury	320	139	-117	-157
Sturminster Newton	163	147	46	-10
Stalbridge	21	9	19	20
All Smaller Villages / Local Centres / All Other	22	9	-3	-0
All Out-of-Centre	-2,505	-2,513	-2,551	-2,551
Sub-Total	-1,145	-1,495	-2,532	-2,632
Eastern Dorset				
Ferndown	125	19	-86	-64
Verwood	33	7	-21	-14
Wimborne	496	107	-16	129
West Moors	4	1	-2	-1
Corfe Mullen	2	1	0	1
West Parley	0	0	0	0
Other Eastern Dorset	-2,112	-2,159	-2,206	-2,212
Sub-Total	-1,451	-2,025	-2,332	-2,162
Purbeck Area				
Purbeck (District)	242	215	117	140
Swanage	1	0	0	-1
Wareham	20	18	10	12
Sub-Total	262	233	127	151
TOTAL DORSET UNITARY AREA WIDE COMPARISON GOODS CAPACITY	2,735	1,651	-1,917	-1,913

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