# Tess Square, Marnhull
# Retail Impact Assessment

**DRAFT**

M B Crocker Ltd

28 January 2025



LICHFIELDS

67267/01/PW/PW
33369273v2

# Contents

# 1.0 Introduction

1.1 This Retail Impact Assessment (RIA) has been prepared on behalf of MB Crocker Limited ("the appellant") to assess the implications of a proposed food store and retail/service uses in Marnhull, Dorset.

## The proposed development

1.2 The proposed development at Tess Square and Butts Close in Marnhull is expected to provide up to 120 dwellings on the Butts Close site and a mixed-use development on the Tess Square site. The mixed-use development is expected to provide:

- food store – 1,455 sq.m (GIA);
- café – 222 sq.m (GIA);
- estate agent – 99 sq.m (GIA);
- hairdresser – 100 sq.m (GIA);
- funeral care – 100 sq.m (GIA);
- dentist – 100 sq.m (GIA);
- vet – 100 sq.m (GIA); and
- offices – 181 sq.m (GIA).

1.3 These main town centres total 2,357 sq.m (GIA). The proposed food store is expected to have a net sales area of 814 sq.m net.

# 2.0 Planning policy

## National Planning Policy Framework

2.1 The National Planning Policy Framework (NPPF) sets out the overarching policy priorities for the planning system, against which local plans will be prepared and decisions made on planning applications.

2.2 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a theme running through both plan-making and decision-taking. In terms of decision-taking, the NPPF states (paragraph 11) that this means (unless material considerations indicate otherwise):

*C) approving development proposals that accord with an up-to-date development plan without delay; or*

*D) where there are no relevant development plan policies, or the policies which are most important for determining the application are out-of-date, granting permission unless:*

> *i. the application of policies in this Framework that protect areas or assets of particular importance provides a strong reason for refusing the development proposed; or*
>
> *ii. any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole, having particular regard to key policies for directing development to sustainable locations, making effective use of land, securing well-designed places and providing affordable homes, individually or in combination.*

2.3 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the NPPF.

### Sequential test

2.4 With regards to main town centre uses including retail and leisure, the NPPF sets out the requirements in terms of the sequential test. Paragraphs 91 and 92 state that:

*"Local planning authorities should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.*

*When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored."*

2.5 Paragraph 93 of the NPPF indicates the sequential test should not be applied to small-scale rural development. Small-scale rural development is not defined in the NPPF Annex 2: Glossary.

2.6 We understand Chapman Lily Planning has submitted a sequential assessment to the Council.

## Retail impact test

2.7 In terms of retail impact, the NPPF indicates (paragraph 94) that local planning authorities, when assessing applications for retail and leisure development outside town centres, which are not in accordance with an up to-date plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Where required the impact analysis should include an assessment of:

*a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*

*b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).*

2.8 The NPPF does not require developers to demonstrate the need for proposed retail or other main town centre uses and commercial competition between these types of uses in any out-of-centre location is not a valid planning consideration.

2.9 Paragraph 95 of the NPPF states where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused.

## National Planning Practice Guidance (NPPG)

2.10 The National Planning Practice Guidance (NPPG) in terms of retail guidance, refers to the sequential test in the context of decision making. Regarding flexibility in format and/or scale, it states that it is not necessary to demonstrate that a potential town centre or edge of centre site can precisely accommodate the scale and form of development being proposed, but rather to consider what contribution more central sites are able to make individually to accommodate the proposal. As such, the guidance makes clear that it is the ability to accommodate the proposal on a single site is the key consideration.

2.11 The Appeal proposal includes main town centre uses that would be located outside of the four main designated town centres in North Dorset. In terms of locational requirements the PPG paragraph: 012 Reference ID: 2b-012-20190722 indicates "*the sequential test should recognise that certain main town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. Robust justification will need to be provided where this is the case, and land ownership does not provide such a justification.*"

2.12 The NPPG states that the impact test should be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible, which in this case is the Joint Town Centres & Retail Study – December 2017 and the Dorset Retail & Leisure Study – January 2023.

2.13 The NPPG states that the impact test only applies to proposals exceeding 2,500 sq.m floorspace unless a different locally appropriate threshold is set by the local planning authority. The NPPG outlines that the basis for undertaking an impact test is to determine whether there would be significant adverse impacts of locating main town centre use development outside of town centres. The NPPG goes on to acknowledge the need for an impact test to assess the potential implications of a scheme against other similar retailers in the area.

## Local plan policies

2.14 The statutory development plan includes the adopted North Dorset Local Plan Part 1, which was adopted in January 2016.

2.15 Policy 2: Core Spatial Strategy identifies Blandford, Gillingham, Shaftesbury and Sturminster Newton as the main centres for services, including retail, health, leisure and employment opportunities in North Dorset. These centres are also identified in Policy 12 (see below). Supporting text at paragraph 3.36 suggests concentrating growth in these centres is expected to enable them to maintain their position as thriving market towns. Stalbridge and Marnhull are identified as Larger Villages, which will be the focus for growth to meet the local needs outside of the main towns. Paragraph 3.39 suggests areas outside the four main towns have more limited access and proximity to services. In these areas development will be more strictly controlled with an emphasis on meeting local and essential rural needs.

2.16 Policy 11: The Economy supports the continued improvement of the four main town centres as the main focus for retail, leisure and other commercial activities. Economic development is supported in the countryside including Stalbridge and the District's villages e.g. Marnhull by enabling rural communities to plan to meet their own needs.

2.17 Policy 12: Retail, Leisure and Other Commercial Development and supporting text at paragraph 6.78 indicates the Council will apply the sequential and impact tests in national policy to applications for main town centre uses that are not in an existing centre and are not in accordance with the development plan, unless the application is for small-scale rural development. Paragraph 6.82 indicates the Council will require a developer to produce an impact assessment for a retail, leisure or office development of 2,500 sq.m or more. The supporting text at paragraph 6.84 indicates access to services outside of the four main towns is a key issue. The Council wishes to ensure community facilities including retail are retained.

## Planning policy conclusions

2.18 The proposed retail and service uses at Marnhull are located outside of the four main town centres and these commercial uses are in an out-of-centre location. The amount of retail, leisure and office floorspace proposed is below the NPPF and the adopted Local Plan impact threshold (2,500 sq.m) and an impact assessment is not required by policy. However, to assist the appeal and the consideration of the planning balance a proportionate retail impact assessment has been prepared.

2.19 Trade diversion and impact on the four main town centres has been considered. Any trade diversion from existing businesses in other locations outside these main centres should be considered to be valid commercial competition and is not a planning consideration.

2.20 Notwithstanding the requirement for a retail impact assessment, the appellant is not required to demonstrate a need for their proposed development. However, proposals that meet an identified need, and where that need cannot be accommodated within a town centre, will generate benefits in terms of providing more choice and higher levels of accessibility for customers.

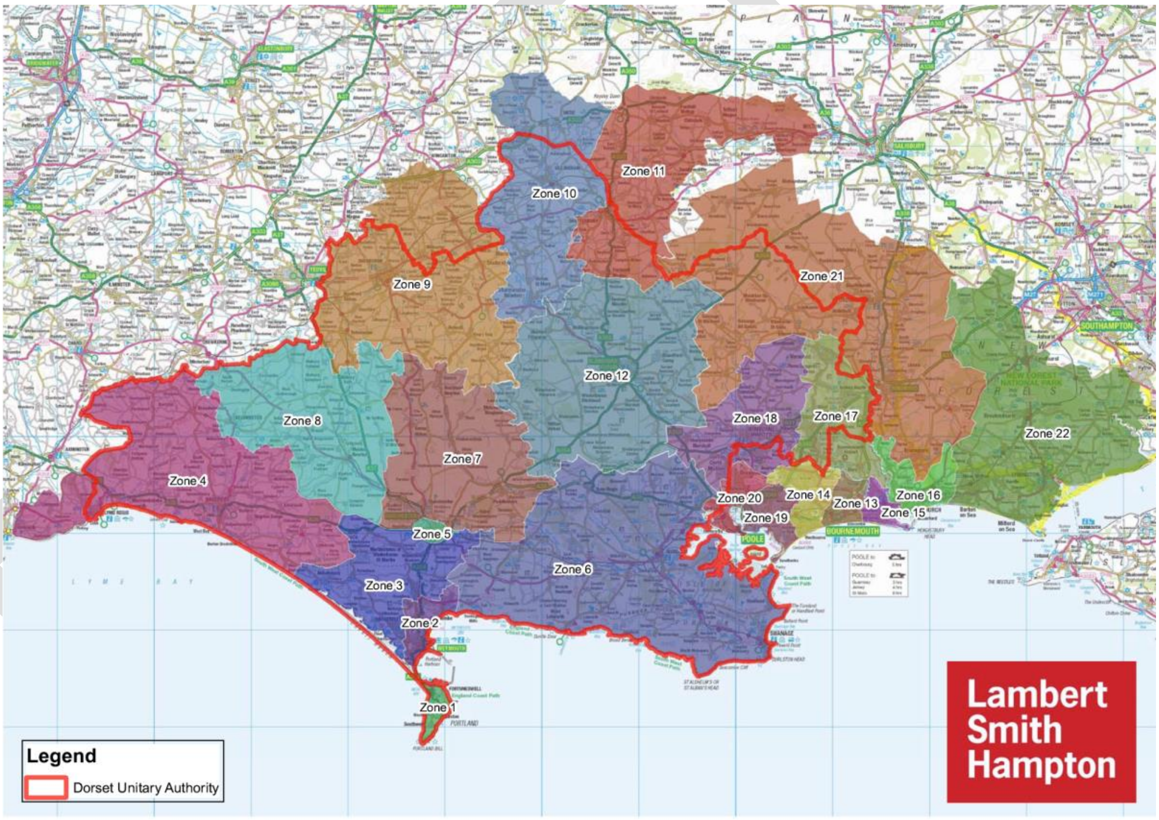
# 3.0 Retail impact assessment

## Introduction

3.1 The proposed development is below the NPPF and adopted Local Plan impact threshold. The proposed food store is expected to generate the highest level of trade diversion and impact on the main town centres. The impact assessment in this section focuses primarily on convenience goods retail impact.

## Methodology and data

3.2 The quantitative analysis is based on information the study area zones adopted in the Joint Town Centres & Retail Study – December 2017 and the Dorset Retail & Leisure Study – January 2023. The study area zones adopted in these two Dorset wide studies are shown below.




3.3 Marnhull falls in the centre of Zone 10, with Gillingham to the north and Sturminster Newton to the south. Stalbridge and Sherborne lie to the west in Zone 9 and Shaftesbury is to the east in Zone 11. The Joint Town Centres & Retail Study – 2017 included a household telephone shopping survey. These survey results were adopted to estimate convenience and comparison goods shopping patterns across Dorset in the 2017 study and the subsequent 2023 update. The survey results indicate that the catchment areas of the four main towns overlap to a significant extent and there is a high degree of retail expenditure outflow from Zones 9, 10 and 11 to larger shopping destinations e.g. Yeovil 20km to the west of Marnhull and Blandford Forum 15km to the southeast.

3.4 Zones 9, 10 and 11 have been adopted in this impact assessment to quantify existing and future convenience goods shopping patterns. These three zones cover the primary catchment areas of the four main towns in North Dorset, i.e. Gillingham, Shaftesbury, Sherborne and Sturminster Newton.

3.5 The primary catchment area of the proposed food store at Marnhull will fall primarily in the central part of Zone 10, up to about four kilometres. It will extend into Zone 9 to the east to Stalbridge. The food store is expected to draw more limited levels of trade from residents beyond 4km in the rest of the three study area zones.

3.6 The study area zones and the 0-2km and 2-4 km area are shown in Appendix 1.

## Design year

3.7 The proposed food store is expected to open during 2027 at the earliest. An impact design year of 2030 has been adopted, allowing two full calendar years to achieve full and settled trading levels. Planning Policy Guidance (PPG) states:

*"The design year for impact testing will need to be selected to represent the year when the proposal has achieved a 'mature' trading pattern. This is conventionally taken as the second full calendar year of trading after the opening of each phase of a new retail development, but it may take longer for some developments to become established."*

3.8 In line with this guidance focuses on the change in trading levels between 2025 and 2030. Horizon year figures for 2035 have also been provided.

## Population and expenditure

3.9 Experian indicates the population in the three study areas zones was 81,064 in 2022, as shown in Table 1 in Appendix 2. Population in Marnhull (the 0-2 km area from the centre of the village) was 1,988 people. A further 1,335 people live in the 2-4 km area from the centre of the village, including residents in Fifehead Magdalen, Hinton St Mary, Stour Provost and West Stour.

3.10 Five planning permission for 24 new residential dwellings were completed in Marnhull village after 2022, as listed overleaf. There are extant planning permissions/prior approvals for a further 249 new dwellings (including 39 dwellings permitted on the Butts Close site). Based on a conservative (low) average of two people per dwelling, recognising some of the residents in the new homes may already live in the local area, these residential completions and commitments would increase Marnhull's population by at least 546 people.

3.11 The appeal proposals will, if permitted increase the number of new dwellings in Marnhull to 354 dwelling, an additional 81 dwellings on the Butts Close site. These additional dwellings along with commitments will increase Marnhull's population by at least 708 people.

3.13 Completed residential planning permissions in Marnhull since 2022:

| | |
|---|---|
| • 2/2017/1215/FUL – Mowes Lane | 1 no. dwelling |
| • 2/2018/0084/OUT and REM2/2020/0042/REM<br>– land north of Kentishworth Road | 9 no. dwellings |
| • 2/2018/1303/OUT – land north of Elmside Musbury Lane | 1 no. dwelling |
| • 2/2018/1406/OUT – land west of Vale Cottage Ham Lane | 2 no. dwellings |
| • P/RES/2021/0447 and P/FUL/2022/07019 – Joyces New St. | 11 no. dwellings |

3.14 Extant residential planning permissions in Marnhull:

| | |
|---|---|
| • P/OUT /2023/00627 - Salisbury Street | 67 no. dwellings |
| • 2/2018/1124/OUT and RES/2024/03588 – land north of Crown Rd | 69 no. dwellings |
| • 2/2018/1808/OUT – land north of Burton Street | 61 no. dwellings |
| • 2/2019/0722/FUL – Ashley Down Farm, Great Down Lane | 1 no. dwelling |
| • P/OUT/2020/00179 – 10 New Street | 1 no. dwelling |
| • P/PAAC/2023/04298 and P/FUL/2024/0603<br>- Strangways Fram, Hains Lane | 4 no. dwellings |
| • P/OUT/2021/03030 – land at Butts Close | 39 no. dwellings |
| • P/FUL/2023/00733 - Squirrel Bank Love Lane | 1 no. dwelling |
| • P/FUL/2023/01556 - Old Farm Bungalow, Stonylawn | 1 no. dwelling |
| • P/FUL/2024/02163 – Blackmore Vale Inn, Burton Street | 2 dwellings |
| • P/FUL/2024/01949 – Cross Tree Fram, Sackmore Lane | 1 dwelling |
| • P/PAAC/2024/00510 - agricultural buildings, Haines Ln/Ham Ln | 1 dwelling |
| • P/FUL/2023/06760 – Ashley Farm, Sodom Lane | 1 dwelling. |

3.15 Population in the study area is projected to increase from 82,469 in 2025 to 83,954 in 2030 and 85,739 in 2035. These Experian population projections are trend based (in line with the ONS's 2018 projections). The projections are not based on residential development commitments and the estimate population growth may not reflect large scale development permitted in the study area e.g. in Gillingham, Blandford and Sturminster Newton. The estimates of population and expenditure growth in this assessment may be conservative.

3.16 The level of available expenditure to support floorspace is based on first establishing per capita levels of spending for the catchment area population. Experian's local consumer expenditure estimates for comparison and convenience goods retail for the year 2022 have been obtained. This expenditure information is based on National Statistics and Experian is a widely adopted and accepted source of information at planning hearings and appeals. Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 21 – February 2024) has been used to forecast future expenditure. Experian's EBS growth forecast rates for 2023 to 2025 reflect the recent economic circumstances, recent past growth rates and provide an appropriate growth rate for the short and longer term, as follows:

- convenience goods: no growth during 2026 to 2030 and +0.1% growth per annum beyond 2030;
- comparison goods: +3.1% per annum growth for 2026 to 2030 and +2.8% per annum beyond 2030; and
- leisure: +1.1% per annum growth for 2026 to 2030 and +0.8% per annum after 2030.

3.17 These growth figures relate to real growth and exclude inflation.

3.18 Special Forms of Trading (SFT) or non-store activity includes other forms of retail expenditure not spent in shops e.g., mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. Experian provides adjusted deductions for SFT and projections. These projections have been used to exclude only on-line expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2025 are 5.6% of convenience goods expenditure and 25.5% for comparison goods expenditure. The projections provided by Experian suggest that these percentages could increase to 6.5% and 27.8% by 2030 respectively. Projections for average convenience goods expenditure per capita split for main and top-up food and grocery shopping (adopting a 70:30 split) are shown in Tables 2A and 2B in Appendix 2. Comparison goods and food/beverage expenditure projections are shown in Tables 2C and 2D.

3.19 These figures have been adopted and suggests the study area population generates the following expenditure in 2025, as shown in Tables 3A to 3E in Appendix 2 (the Marnhull 0-4km figures in brackets):

- convenience goods retail expenditure £223.58 million (£9.97 million)
- comparison goods retail expenditure £260.31 million (£11.58 million)
- food and beverage expenditure £134.43 million (£6.0 million)

3.20 Residents in the 4km area from the centre of Marnhull village currently generate total retail and food/beverage expenditure of £27.55 million.

3.21 Experian's population and expenditure per capita projections suggest total available convenience goods expenditure in the study area will increase slightly by 0.9% between 2025 and 2030, from £223.58 million to £223.57 million. Convenience goods expenditure in the 0-4km Marnhull area will increase by 18.6% between 2025 and 2030, from £9.97 million to £11.82 million, due to residential developments.

3.22 Comparison goods expenditure in the study area will increase by 15% between 2025 and 2030, increasing from £260.31 million to £299.36 million. Comparison goods expenditure in the 0-4km Marnhull area will increase by 34.8% between 2025 and 2030, from £11.58 million to £15.62 million.

3.23 Food and beverage expenditure in the study area will increase by 7.6% between 2025 and 2030, increasing from £134.43 million to £144.61 million. Food and beverage expenditure in the 0-4km Marnhull area will increase by 26.4% between 2025 and 2030, from £6 million to £7.58 million.

## Base year shopping patterns

3.24 Joint Town Centres & Retail Study – December 2017 and the Dorset Retail & Leisure Study – January 2023 adopted results from a household telephone survey undertaken by NEMS Market Research in July 2017. This survey included 1,204 completed interviews with 100 interviews in each zone (Zones 9, 10 and 11). The survey results are contained in the Joint Town Centres & Retail Study Appendices – Volume II, Appendix 25.

3.25 Question Q01 asked respondents where they normally shop for the household's main food and grocery shopping. Question Q06 asked respondents about other destinations regularly used for main food shopping. Question Q07 asked respondents where they normally do most of their small-scale top-up shopping (e.g. to buy bread, milk etc). Question Q08 asked respondents about other destinations regularly used for small scale top-up shopping. These questions are a fairly standard and widely adopted for quantifying convenience goods expenditure flows.

3.26 The base year 2025 convenience goods turnover of food stores and shopping destination within the study area have been estimated based on market shares or penetration rates, estimated from these household survey results for Zones 9, 10 and 11. The markets shares have been adjusted to reflect the implementation of food store completions since the household survey was undertaken in 2017 i.e. a new Aldi store in Gillingham (opened in 2020) and a new Lidl store in Shaftesbury (opened in 2021). The adjusted market shares for convenience goods shopping are shown in Tables 4A to 4D in Appendix 2.

3.27 The results of the household shopper survey for main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4A to 4D in Appendix 2 are a combined rate for the normal main, secondary main, normal top-up and secondary top-up shopping destinations based on a 70:30 expenditure split between main and top up shopping. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind. A 75:25 split expenditure split has been adopted for the normal and secondary shopping destinations for both main and top-up shopping.

3.28 Estimated convenience goods expenditure flows are shown in Tables 5A to 5E. The combined main and top-up shopping markets shares are summarised in Table 3.1.

3.29 As indicated earlier, Marnhull lies within Zone 10. The household survey results indicate Gillingham is the main food and grocery shopping destination for residents in Zone 10 followed by Sturminster Newton. However, the survey results also suggest a significant amount of expenditure flows out of Zone 10 to food stores in Blandford Forum, Shatesbury and Wincanton.

3.30 Household survey respondents were asked (Question Q02) what they like about their normal main food shopping destination. In Zone 10 the main factors liked by respondents about their normal main food shopping destination were convenience to home (34%), low prices/value (21.9%), quality of goods available (16.1%) and range of food goods available (14.8%).

Table 3.1 Combined convenience goods market shares in the study area (% of all expenditure in each zone)

| Zone | Marnhull 0-4 kms | Zone 9 | Zone 10 | Zone 11 | All study area |
|---|---|---|---|---|---|
| Marnhull shops | 5.0 | 0 | 0.2 | 0.0 | **0.3** |
| Sturminster Newton | 12.1 | 1.8 | 14.4 | 0.5 | **5.6** |
| Gillingham | 51.8 | 12.9 | 53.5 | 26.4 | **30.0** |
| Stalbridge | 0.8 | 10.1 | 1.0 | 0.0 | **4.4** |
| Sherborne | 1.2 | 28.7 | 1.3 | 0.8 | **12.2** |
| Shaftesbury | 4.9 | 2.9 | 4.9 | 48.5 | **15.3** |
| Blandford Forum | 11.3 | 1.1 | 11.3 | 1.3 | **4.6** |
| Wincanton | 4.7 | 17.0 | 4.7 | 3.8 | **9.5** |
| Yeovil | 0.0 | 18.2 | 0.0 | 0.0 | **7.4** |
| Other Zones 9, 10 and 11 | 1.5 | 0.0 | 2.0 | 7.9 | **2.7** |
| Elsewhere/internet | 6.6 | 7.3 | 6.7 | 10.8 | **8.0** |
| **Total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

Source: Table 5E, Appendix 2.

### Turnover of the proposed food store and other uses

3.31 The proposed food store will have a sales area of 814 sq.m net. This is expected to include an in-store café of 63 sq.m. However, the retail impact assessment assumes all the net sales area (814 sq.m) will be devoted to retail sales and up to 90% of the sales floorspace will be convenience goods retail floorspace.

3.32 The operator for the food store is not confirmed at this stage. We understand the operator is unlikely to be a main national food and grocery multiples e.g. Co-op, Sainsbury's or Tesco. The store is more likely to attract a smaller independent operator, which are likely to trade at a lower density that the main national operators. Nevertheless, a higher generic average convenience goods sales density of £11,000 per sq.m net has been adopted, consistent with the company average sales densities for the main food store operators. A higher generic average comparison goods sales density of £6,500 per sq.m net has also been adopted.

3.33 The estimated convenience and comparison goods turnover of the proposed food store is calculated in Table 4A in Appendix 2. The total turnover is £8.59 million, split £8.06 convenience goods and £0.53 comparison goods.

3.34 The in-store café and separate café (222 sq.m gross) proposed are expected to have a combined net area of 218 sq.m net. The turnover of these café uses would be £1.31 million, based on an average sales density of £6,000 per sq.m net. Other service facilities include a hairdresser, estate agent, funeral care, dentist and vet occupying 100 sq.m each.

3.35 The scale of the comparison goods turnover (£0.53 million) is insignificant, accounting for less than 4% of the 0-4 km area residents' total comparison goods expenditure in 2030 (£15.62 million as shown in Table 3D). The proposed 120 new homes alone, will generate additional comparison goods expenditure of £0.92 million, assuming 240 people with an average comparison goods spend of £3,823 per person in 2030.

3.36 The scale of the café turnover (£1.31 million) is also insignificant, accounting for about 17% of Marnhull residents' total food/beverage expenditure in 2030 (£7.58 million as shown in Table 3E).

3.37 Experian local expenditure data for 2022 or the 0-4km area from Marnhull suggests local residents generate £0.37 million on hairdressing salons and personal grooming. Population growth between 2022 and 2030 should increase this expenditure to at least £0.5 million.

3.38 There will be no discernible impact on existing comparison goods, food/beverage and services facilities. Indeed, the additional comparison goods expenditure generated by the new homes will have a positive impact.

3.39 The remainder of this Section estimates the origin of the proposed food store's convenience goods turnover and the implications for designated town centres.

## Designated town centres and other destinations

3.40 Sturminster Newton town centre is the closest centre to the proposed developments and is likely to experience the highest levels of proportional impact. It is approximately 4.5kms to the south of the appeal site. Stalbridge is a similar distance to the west but is not currently a designated town centre. The other nearest town centres are in Gillingham about 8km to the north; Shaftesbury about 9kms to the northeast, Sherborne 14km to the west and Wincanton 12km to the northwest.

3.41 The catchment areas of these centres will overlap with the proposed appeal development and food and grocery shopping trip trade diversion from these centres is envisaged. An overview of the centres that are most likely to experience trade diversion and impacts is provide below.

### Marnhull Village

3.42 Marnhull is not a designated as town, village or local centre in the adopted Local Plan. Marnhull has a small selection of facilities. There is cluster of facilities in the north of village in Burton Street, which includes Robin Hill Store & Post Office, a hair and beauty salon, a curtain shop and the Blackmore Vale Inn. The is a small Spar convenience store in the southwest of the village on New Street. Other facilities include Marnhull surgery and pharmacy, Cooks Garage and the Crown hotel.

### Stalbridge

3.43 Stalbridge is also not a designated as town, village or local centre in the adopted Local Plan. Stalbridge has a more extensive choice of facilities than Marnhull, including:

- Dike & Sons supermarket (VOA - sales area 1,175 sq.m net)
- Butcher
- Post Office
- Optician
- Hot food takeaways
- Accountant office
- Community shop
- Community centre
- Hairdressing salon
- Pharmacy

- The Swan public house
- Bicycle shop
- Coffee shop
- Café
- Florist
- Library
- Fabric shop
- Indian restaurant
- Petrol filling station.

### Sturminster Newton

3.44 Sturminster Newton is a designated town centre in the adopted Local Plan. The Joint Town Centres & Retail Study – December 2017 (Tables 9.1 and 9.2) indicated the centre had 61 units with a total floor area of about 9,000 sq.m. There were seven vacant shop units in 2015, a vacancy rate of 11.5% which was similar to the UK average at that time (11.2%).

3.45 There are six convenience goods outlets including a Co-op convenience store (481 sq.m net), a One Stop convenience store (153 sq.m net – VOA), a mediterranean food store, baker, greengrocer and newsagent.

### Gillingham

3.46 Gillingham is a designated town centre in the adopted Local Plan. The Joint Town Centres & Retail Study – December 2017 (Tables 7.1 and 7.2) indicated the centre had 99 units with a total floor area of about 22,500 sq.m. There were nine vacant shop units in October 2016, a vacancy rate of 9.1%, below the UK average at that time (11.2%).

3.47 There are six convenience goods outlets in the town centre, including:

- Asda supermarket (1,701 sq.m net sales)
- Waitrose supermarket (1,933 sq.m net sales)
- Lidl (951 sq.m net sales)
- Iceland (473 sq.m net sales)

3.48 In addition to these in-centre stores, Gillingham has out-of-centre stores i.e. Aldi (1,110 sq.m net sales) and Budgens (364 sq.m net sales) at Kingsmead Business Park and a small Co-op store at Lodbourne Green.

3.49 The Joint Town Centres & Retail Study identified Gillingham's "good range of supermarkets" as a key strength.

### Shaftesbury

3.50 Shaftesbury is a designated town centre in the adopted Local Plan. The Joint Town Centres & Retail Study – December 2017 (Tables 8.1 and 8.2) indicated the centre had 130 units with a total floor area of about 23,000 sq.m. There were five vacant shop units in March 2016, a vacancy rate of 3.9%, significantly below the UK average at that time (11.2%).

3.51 There are five convenience goods outlets in the town centre, including a Tesco supermarket (2,164 sq.m net sales), Morrisons Daily (129 sq.m net sales), greengrocer, wine shop and deli. There is an edge-of-centre Lidl store (903 sq.m net) and a small out-of-centre Co-op store.

3.52 The Joint Town Centres & Retail Study identified Shaftesbury's "good convenience provision" and low vacancy levels as key strengths.

### Sherborne

3.53 Sherborne is a designated town centre in the adopted West Dorset, Weymouth & Portland Local Plan 2015. The Joint Town Centres & Retail Study – December 2017 (Tables 15.1 and 15.2) indicated the centre had 175 units with a total floor area of about 17,800 sq.m. There were eight vacant shop units in February 2016, a vacancy rate of 4.6%, significantly below the UK average at that time (11.2%).

3.54 There are five convenience goods outlets in the town centre, including a Tesco supermarket (2,164 sq.m net sales), Morrisons Daily (129 sq.m net sales), greengrocer, wine shop and deli. There is an edge-of-centre Lidl store (903 sq.m net) and a small out-of-centre Co-op store.

### Blandford Forum

3.55 Blandford Forum is a designated town centre in the adopted Local Plan. The Joint Town Centres & Retail Study – December 2017 (Tables 6.1 and 6.2) indicated the centre had 186 units with a total floor area of about 28,000 sq.m. There were 12 vacant shop units in March 2017, a vacancy rate of 6.5%, significantly below the UK average at that time (11.2%).

3.56 There are 14 convenience goods outlets in the centre, including:

- Morrisons (1,511 sq.m net sales)
- Marks & Spencer Foodhall (863 sq.m net sales)
- Iceland (528 sq.m net sales)

3.57 In addition to these in-centre stores, Blandford has out-of-centre food stores i.e. Tesco (1,971 sq.m net sales), Lidl (1,032 sq.m net), Budgens (364 sq.m net sales).

3.58 The Joint Town Centres & Retail Study identified Blandford as "a vital and viable centre" with a good range of shopping and leisure facilities, including "good convenience provision" and "low vacancy levels".

## Base year trading levels 2025

3.59 The current turnover of food stores and convenience goods destinations in the study area has been estimated in Tables 5A to 5E in Appendix 2. These estimates are based on the convenience goods market shares shown in Tables 4A to 4D in Appendix 2. The market shares are based on the household shopper survey results, as described earlier. The 2025 base year turnover estimates are shown in the first column of figures (Column A) in Table 10 in Appendix 2. The current convenience goods turnovers of destinations are as follows:

- Marnhull £0.77 million
- Sturminster Newton £13.71 million
- Gillingham £85.65 million
- Stalbridge £10.41 million
- Sherborne £31.44 million

- Shaftesbury £45.49 million
- Blandford Forum £30.06 million
- Wincanton £47.16 million
- Yeovil £109.65 million.

## Design year trading 2030 – without the appeal proposals

3.60 The 2025 base year turnover estimates have been projected to 2030 based on constant market share, as shown in Table 6. The 2030 pre-development turnover estimates are shown in the first column of figures (Column B) in Table 10 in Appendix 2. The projected convenience goods turnovers of destinations in 2030 are as follows:

- Marnhull £0.90 million
- Sturminster Newton £13.88 million
- Gillingham £86.63 million
- Stalbridge £10.49 million
- Sherborne £31.67 million
- Shaftesbury £45.55 million
- Blandford Forum £30.55 million
- Wincanton £47.55 million
- Yeovil £110.41 million.

## Design year trading levels 2030 - with the appeal store

3.61 As indicated earlier, the expected convenience goods turnover of the proposed food store at Marnhull is £8.06 million, as shown in Table 7A in Appendix 2. The expected pattern of trade draw from each zone is shown in Table 7B in Appendix 2. Most of the store's trade (63% - £5.08 million) is expected to come from residents in the 0-4km area from Marnhull. A further 16% (£1.29 million) is expected to come from residents in Zone 9, primarily the Stalbridge and Henstridge areas. Additional trade will be attracted from the rest of Zone 10 (£0.89 million) e.g. from Kington Magna and East Stour. A small amount of trade is expected to come from residents in Zone 11 (£0.4 million) and inflow from beyond the study area (£0.4 million).

3.62 The revised shopping patterns, with the proposed food store, are shown in Table 9 in Appendix 2. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of the food store, and judgments about the propensity for the store to compete with other facilities for food and grocery shopping trips. The impact of the proposed store is shown in Table 10 in Appendix 2. The proposal will compete primarily with other food stores in the study area.

3.63 The residual trading performance for each destination post-development in 2030 is shown in Column C in Table 10, Appendix 2. The level of trade diversion to the proposed store is shown in Column D and the proportional reduction in turnover in 2030 is shown in Column E.

3.64 The levels of impact (reduction in turnover) vary from less than -0.1% to -20.3%. The highest impact (-20.3%) is expected to fall on existing facilities in Marnhull. However, this reduction in turnover will be offset by growth in expenditure between 2025 and 2030, due to residential developments in the village, including the appeal proposals.

3.65 The projected post development convenience goods turnover of facilities in 2030 is as follows:

- Marnhull £0.72 million
- Sturminster Newton £12.77 million
- Gillingham £82.19 million
- Stalbridge £10.14 million
- Sherborne £31.29 million
- Shaftesbury £44.82 million
- Blandford Forum £30.30 million
- Wincanton £47.31 million
- Yeovil £110.18 million.

## Impact implications

3.66 In terms of the impact tests set out in the NPPF, the limited level of trade diversion needs to be considered in terms of the impact on:

- town centre vitality and viability; and
- existing, committed and planned investment.

### Marnhull

3.67 As indicate above, Marnhull is not a designated town centre, and existing businesses are not afforded planning protection from commercial competition. Notwithstanding this policy position, existing convenience goods shops in Marnhull are expected to benefit from residential developments within the village. Their convenience goods turnover is projected to increase from £0.77 million in 2025 to £0.90 million in 2030. The proposed appeal food store will reduce the 2030 turnover to £0.72 million, which is only 6.5% lower than the base year 2025 turnover. Even if one of the convenience outlets in the village were to close, which is unlikely, residents in Marnhull would still have an improved provision of food and grocery facilities within walking distance.

### Stalbridge

3.68 As in Marnhull, Stalbridge is not a designated town centre, and existing businesses are not afforded planning protection from commercial competition.

3.69 The convenience goods turnover of outlets in Stalbridge is projected to increase from £10.41 million in 2025 to £10.49 million in 2030. The proposed appeal food store will reduce the 2030 turnover to £10.14 million, a total trade diversion of £0.36 million. The post-development turnover is only 3.4% lower than the base year 2025 turnover. Most trade diversion (£0.29 million) will come from the Dike & Son store, but this store will retain a healthy convenience goods turnover of £6.08 million compared with the base year turnover of £6.33 million. Impact on Stalbridge will not be significant.

### Sturminster Newton

3.70 The convenience goods turnover of outlets in Sturminster Newton is projected to increase from £13.71 million in 2025 to £13.88 million in 2030. The proposed appeal food store will reduce the 2030 turnover to £12.77 million, which is 6.8% lower than the base year 2025 turnover. Most trade diversion (£0.92 million) will come from the Co-op store. The residual turnover of the Co-op store is £7.71 million. The Co-op store has a sales net area of 481 sq.m net (source ORC Storepoint). The Co-op company average sales density for convenience goods floorspace is £12,791 per sq.m net (2024 prices). This sales density suggests a benchmark turnover of £6.15 million for a Co-op store of this size (based on 100% convenience goods sales). The estimated residual turnover of the store (£7.71 million) is over 25% above this benchmark. The Co-op store will continue to trade healthily.

3.71 Impact on other convenience goods outlets in the town centre is only -3.7%, and the residual turnover (£4.05 million) is only marginally lower than the base year turnover (£4.09 million). No shop closures are envisaged and no reduction in consumer choice or the vitality and viability of the centre will occur. Impact on Sturminster Newton will not be significant.

### Gillingham

3.72 The convenience goods turnover of outlets in Gillingham is projected to increase from £85.65 million in 2025 to £86.63 million in 2030. The proposed appeal food store will reduce the 2030 turnover to £82.19 million, which is only 4% lower than the base year 2025 turnover. Most trade diversion (£4.34 million) will come from the four main food stores in the town, i.e. Asda, Aldi, Lidl and Waitrose.

3.73 The company benchmark turnovers of the three town centre food stores are as follows:

- Asda – 1,337 sq.m net at 11,590 per sq.m net = £15.50 million
- Lidl – 850 sq.m net at 7,413 per sq.m net = £6.30 million
- Waitrose – 1,691 sq.m net at 15,647 per sq.m net = £26.46 million

3.74 The residual post development turnovers of the Asda (£18.37 million) and Lidl store (£21.66 million) are significantly higher than the company average benchmark turnovers. The Waitrose store is estimated to trade 9.4% below benchmark (£23.98 million compared with £26.46 million), which is within the normal range food store typically trade around their company average. Food stores in Gillingham are expected to continue to trade healthily.

3.75 Impact on other convenience goods outlets in the town centre is only -2.9%, and the residual turnover (£3.39 million) is only marginally lower than the base year turnover (£3.46 million). No shop closures are envisaged and there will be no reduction in consumer choice or the vitality and viability of the centre. Impact on Gillingham will not be significant.

### Shaftesbury

3.76 The convenience goods turnover of outlets in Shaftesbury is projected to increase from £45.49 million in 2025 to £45.55 million in 2030. The proposed appeal food store will reduce the 2030 turnover to £44.82 million, which is only 1.5% lower than the base year 2025 turnover. Most trade diversion (£0.7 million) will come from the two main food stores in the town, i.e. Tesco and Lidl. The company benchmark turnovers of these stores are as follows:

- Tesco – 1,728 sq.m net at 16,837 per sq.m net = £29.09 million
- Lidl – 923 sq.m net at 7,413 per sq.m net = £6.84 million

3.77 The residual post development turnover of the Lidl store (£10.82 million) is significantly higher than the company average benchmark turnover. The Tesco store is estimated to trade only 2.5% below benchmark (£28.35 million compared with £29.09 million). Food stores in Shaftesbury are expected to continue to trade healthily.

3.78 Impact on other convenience goods outlets in the town centre is only -0.5%, and the residual turnover (£2.42 million) is only marginally lower than the base year turnover (£2.43 million). No shop closures are envisaged and there will be no reduction in consumer choice or the vitality and viability of the centre. Impact on Shaftesbury will not be significant.

### Blandford Forum

3.79 The proposed appeal food store is expected to divert only £0.24 million from Blandford Forum, most of which will come from the out-of-centre Tesco store. Estimated impact on the Tesco store is less than 1%. Limited impact is envisaged on food stores in the town centre.

### Other destinations

3.80 Impacts on other town centres and destination are expected to range from -0.1% to -1.2%. These levels of impact are not significant. Trade diversion and impact on convenience goods facilities in Sherborne is only £0.41 million and -1.1%. This impact will fall primarily on the Sainsbury's and Waitrose stores. The post development residual turnover of Sherborne is £35.79 million, which is only marginally lower than the 2025 base year turnover (£31.44 million).

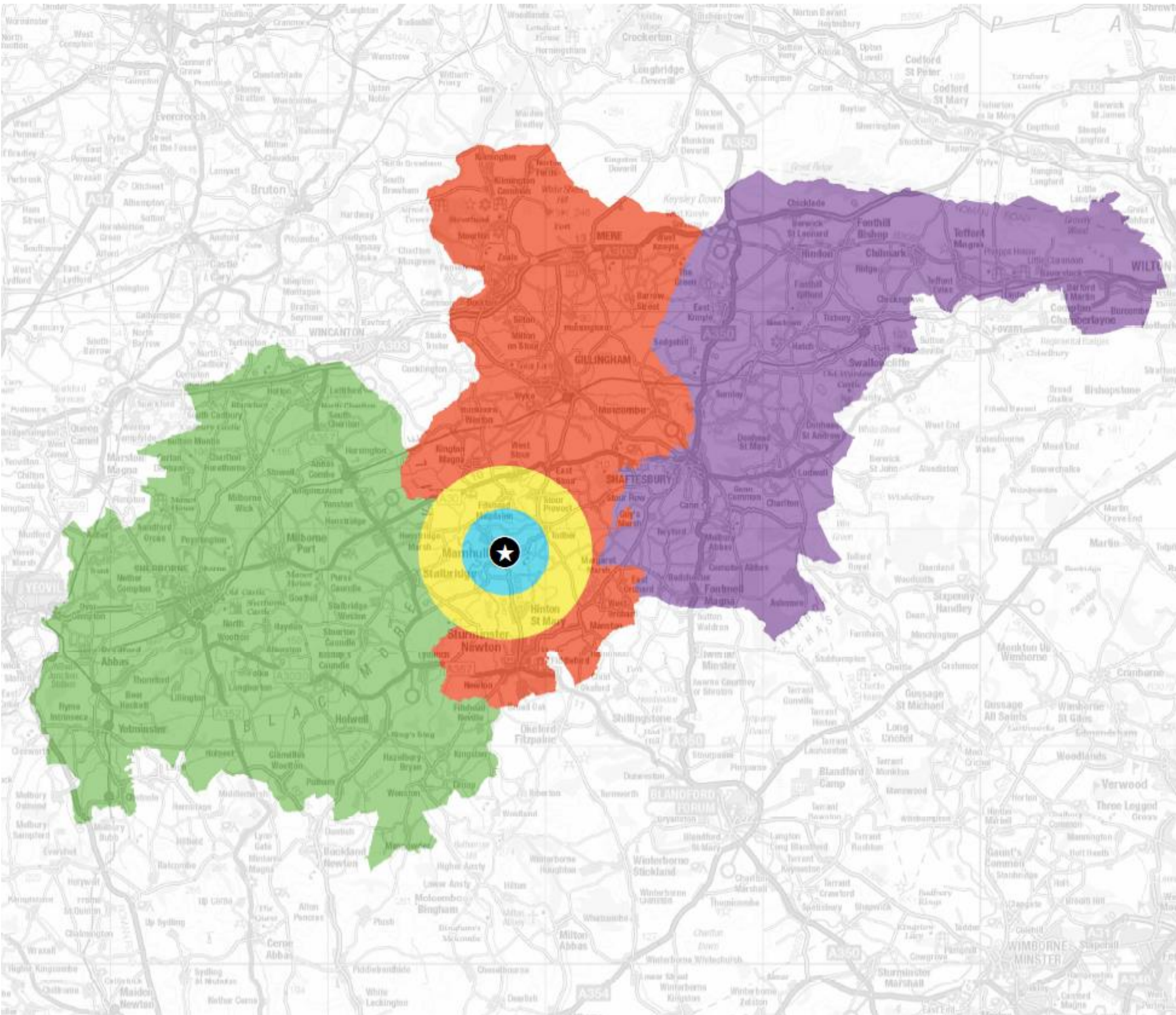
3.81 Impact on food stores in Wincanton and Yeovil ranges from -0.2% to -0.7%. This low level of impact will be mostly offset by expenditure growth between 2025 and 2030.

### Summary

3.82 The appeal proposals will not significantly change the trading performance of centres and the quantitative analysis raises no concerns regarding the future trading of any designated centres or their vitality and viability.

3.83 Impact is expected to be dispersed amongst a number of food and grocery shopping destinations, which reflects existing trading patterns in the study area. The predicted levels of trade diversion and impact are insignificant in view of the healthy trading levels within existing stores. The proposed development will not a have a significant adverse impact on existing, committed or planned investment or the vitality and viability of centres in terms of the considerations set out in the NPPF.

# Appendix 1 Study area




**Key**

Postcode: DT10 1PU

**Zones:**

0 - 2km Distance Ring

2 - 4km Distance Ring

Zone 9

Zone 10

Zone 11

# Appendix 2 Retail impact tables

**Table 1: Study area population projections**

| Zone | 2022 | 2025 | 2030 | 2035 |
|---|---|---|---|---|
| Residential developments Marnhull* | 0 | 48 | 708 | 708 |
| Marnhull 0-2km | 1,988 | 1,988 | 1,988 | 1,988 |
| Marnhull hinterland 2-4km | 1,335 | 1,354 | 1,351 | 1,341 |
| Zone 9 - Sherborne / Stalbridge | 32,375 | 33,005 | 33,554 | 33,870 |
| Zone 10 - Gillingham / Sturminster | 24,660 | 25,028 | 25,134 | 26,519 |
| Zone 11 - Shaftesbury | 20,706 | 21,046 | 21,213 | 21,307 |
| **Total** | **81,064** | **82,469** | **83,948** | **85,733** |

*Source: Experian MMG3 population projections*

** new residential developments - 24 completed homes since 2022 and 330 proposed homes at an avergae of 2 people per home.*

**Table 2A: Main food and grocery shopping convenience goods expenditure per person (£)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 2,070 | 2,050 | 2,048 |
| Marnhull hinterland 2-4km | 2,045 | 2,026 | 2,022 |
| Zone 9 - Sherborne / Stalbridge | 1,917 | 1,898 | 1,896 |
| Zone 10 - Gillingham / Sturminster | 1,840 | 1,823 | 1,820 |
| Zone 11 - Shaftesbury | 1,910 | 1,892 | 1,889 |

**Table 2B: Top-up food and grocery shopping convenience goods expenditure per person (£)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 887 | 879 | 878 |
| Marnhull hinterland 2-4km | 877 | 868 | 867 |
| Zone 9 - Sherborne / Stalbridge | 821 | 814 | 812 |
| Zone 10 - Gillingham / Sturminster | 789 | 781 | 780 |
| Zone 11 - Shaftesbury | 819 | 811 | 810 |

**Table 2C: Comparison goods expenditure per person (£)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 3,386 | 3,823 | 4,310 |
| Marnhull hinterland 2-4km | 3,467 | 3,914 | 4,413 |
| Zone 9 - Sherborne / Stalbridge | 3,195 | 3,607 | 4,067 |
| Zone 10 - Gillingham / Sturminster | 2,999 | 3,386 | 3,817 |
| Zone 11 - Shaftesbury | 3,240 | 3,658 | 4,124 |

**Table 2D: Food and beverage expenditure per person (£)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 1,771 | 1,871 | 1,947 |
| Marnhull hinterland 2-4km | 1,606 | 1,696 | 1,765 |
| Zone 9 - Sherborne / Stalbridge | 1,717 | 1,813 | 1,887 |
| Zone 10 - Gillingham / Sturminster | 1,542 | 1,629 | 1,695 |
| Zone 11 - Shaftesbury | 1,732 | 1,830 | 1,904 |

*Sources:*

*Experian Local Expenditure 2022 (2022 prices)*

*Experian expenditure and SFT projections - Retail Planner Briefing Note 21 - February 2024*

**Table 3A: Main food and grocery shopping convenience goods expenditure (£m)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 4.21 | 5.54 | 5.53 |
| Marnhull hinterland 2-4km | 2.77 | 2.74 | 2.71 |
| Zone 9 - Sherborne / Stalbridge | 63.26 | 63.70 | 64.20 |
| Zone 10 - Gillingham / Sturminster | 46.06 | 45.81 | 48.26 |
| Zone 11 - Shaftesbury | 40.20 | 40.14 | 40.26 |
| **Total** | **156.50** | **157.93** | **160.97** |

*Source: Tables 1 and 2A*

**Table 3B: Top-up food and grocery shopping convenience goods expenditure (£m)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 1.81 | 2.37 | 2.37 |
| Marnhull hinterland 2-4km | 1.19 | 1.17 | 1.16 |
| Zone 9 - Sherborne / Stalbridge | 27.11 | 27.30 | 27.52 |
| Zone 10 - Gillingham / Sturminster | 19.74 | 19.63 | 20.68 |
| Zone 11 - Shaftesbury | 17.23 | 17.20 | 17.25 |
| **Total** | **67.07** | **67.68** | **68.99** |

*Source: Tables 1 and 2B*

**Table 3C: Combined main and top-up food and grocery shopping convenience goods expenditure (£m)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 6.02 | 7.91 | 7.90 |
| Marnhull hinterland 2-4km | 3.96 | 3.91 | 3.87 |
| Zone 9 - Sherborne / Stalbridge | 90.37 | 91.00 | 91.72 |
| Zone 10 - Gillingham / Sturminster | 65.80 | 65.45 | 68.95 |
| Zone 11 - Shaftesbury | 57.43 | 57.34 | 57.51 |
| **Total** | **223.58** | **225.61** | **229.95** |

*Source: Tables 3A and 3B*

**Table 3D: Comparison goods expenditure (£m)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 6.89 | 10.33 | 11.64 |
| Marnhull hinterland 2-4km | 4.69 | 5.29 | 5.92 |
| Zone 9 - Sherborne / Stalbridge | 105.46 | 121.03 | 137.74 |
| Zone 10 - Gillingham / Sturminster | 75.07 | 85.10 | 101.23 |
| Zone 11 - Shaftesbury | 68.20 | 77.60 | 87.88 |
| **Total** | **260.31** | **299.36** | **344.41** |

*Source: Tables 1 and 2C*

**Table 3E: Food and beverage expenditure (£m)**

| Zone | 2025 | 2030 | 2035 |
|---|---|---|---|
| Marnhull 0-2km | 3.61 | 5.05 | 5.26 |
| Marnhull hinterland 2-4km | 2.40 | 2.53 | 2.61 |
| Zone 9 - Sherborne / Stalbridge | 53.00 | 56.91 | 59.78 |
| Zone 10 - Gillingham / Sturminster | 42.96 | 45.57 | 50.04 |
| Zone 11 - Shaftesbury | 32.46 | 34.56 | 36.12 |
| **Total** | **134.42** | **144.61** | **153.80** |

*Source: Tables 1 and 2D*

**Table 4A: Main-food shopping - normal destination market shares (%)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow |
|---|---|---|---|---|---|---|
| **Zone 10** | | | | | | |
| **Marnhull** | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Sturminster Newton** | | | | | | |
| Co-op, Sturminster Newton | 2.0% | 2.0% | 0.0% | 2.0% | 0.0% | 5.0% |
| Other Sturminster Newton | 1.4% | 1.4% | 0.0% | 1.4% | 0.0% | 5.0% |
| **Gillingham** | | | | | | |
| Asda, Gillingham | 10.5% | 10.5% | 0.0% | 10.5% | 4.1% | 20.0% |
| Lidl, Gillingham | 14.3% | 14.3% | 6.3% | 14.3% | 4.0% | 20.0% |
| Waitrose, Gillingham | 19.2% | 19.2% | 1.3% | 19.2% | 14.0% | 20.0% |
| Aldi, Gillingham (opened 2020) | 10.0% | 10.0% | 4.0% | 10.0% | 3.0% | 20.0% |
| Other Gillingham | 0.8% | 0.8% | 0.0% | 0.8% | 0.0% | 10.0% |
| Other Zone 10 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Zone 9** | | | | | | |
| **Stalbridge** | | | | | | |
| Dike & Son, Stalbridge | 0.0% | 0.0% | 4.7% | 0.0% | 0.0% | 5.0% |
| Other Stalbridge | 0.0% | 0.0% | 1.1% | 0.0% | 0.0% | 5.0% |
| **Sherborne** | | | | | | |
| Sainsbury's, Sherborne | 1.3% | 1.3% | 20.7% | 1.3% | 0.0% | 25.0% |
| Waitrose, Sherborne | 0.0% | 0.0% | 3.8% | 0.0% | 0.0% | 25.0% |
| Sherborne | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 15.0% |
| **Zone 11** | | | | | | |
| **Shaftesbury** | | | | | | |
| Co-op, Shaftesbury | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 25.0% |
| Tesco, Shaftesbury | 4.2% | 4.2% | 3.0% | 4.2% | 37.0% | 25.0% |
| Lidl, Shaftesbury (opened 2021) | 1.0% | 1.0% | 1.0% | 1.0% | 20.0% | 25.0% |
| Other Shaftesbury | 0.6% | 0.6% | 0.0% | 0.6% | 0.0% | 15.0% |
| Other Zone 11 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Zones 9, 10 and 11 sub-total** | **65.3%** | **65.3%** | **46.6%** | **65.3%** | **83.5%** | |
| **Blandford Forum** | | | | | | |
| Tesco, Blandford Forum | 16.8% | 16.8% | 2.1% | 16.8% | 0.0% | 65.0% |
| Marks & Spencer, Blandford Forum | 0.6% | 0.6% | 0.0% | 0.6% | 0.0% | 65.0% |
| Other Blandford Forum | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 65.0% |
| **Wincanton** | | | | | | |
| Lidl, Wincanton | 1.2% | 1.2% | 5.6% | 1.2% | 0.4% | 55.0% |
| Morrison, Wincanton | 4.3% | 4.3% | 15.1% | 4.3% | 2.1% | 55.0% |
| Other Wincanton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 55.0% |
| **Yeovil** | | | | | | |
| Asda, Yeovil | 0.0% | 0.0% | 5.5% | 0.0% | 0.0% | 85.0% |
| Tesco Extra, Yeovil | 0.0% | 0.0% | 7.6% | 0.0% | 0.0% | 85.0% |
| Lidl, Yeovil | 0.0% | 0.0% | 1.6% | 0.0% | 0.0% | 85.0% |
| Morrisons, Yeovil | 0.0% | 0.0% | 3.5% | 0.0% | 0.0% | 85.0% |
| Other Yeovil | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 85.0% |
| | | | | | | |
| Elsewhere | 11.8% | 11.8% | 11.7% | 11.8% | 14.0% | 90.0% |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: NEMS Household Survey 2017 and Lichfields' adjustments for completions since 2017*

**Table 4B: Main-food shopping - other regular destination market shares (%)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow |
|---|---|---|---|---|---|---|
| **Zone 10** | | | | | | |
| **Marnhull** | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Sturminster Newton** | | | | | | |
| Co-op, Sturminster Newton | 1.2% | 1.2% | 0.0% | 1.2% | 0.0% | 5.0% |
| Other Sturminster Newton | 14.2% | 14.2% | 0.0% | 14.2% | 0.0% | 5.0% |
| **Gillingham** | | | | | | |
| Asda, Gillingham | 18.6% | 18.6% | 27.4% | 18.6% | 7.0% | 20.0% |
| Lidl, Gillingham | 17.9% | 17.9% | 4.4% | 17.9% | 15.0% | 20.0% |
| Waitrose, Gillingham | 8.2% | 8.2% | 0.0% | 8.2% | 21.0% | 20.0% |
| Aldi, Gillingham (opened 2020) | 13.0% | 13.0% | 3.0% | 13.0% | 11.0% | 20.0% |
| Other Gillingham | 0.8% | 0.8% | 0.0% | 0.8% | 0.0% | 10.0% |
| Other Zone 10 | 0.9% | 0.9% | 0.0% | 0.9% | 0.0% | 5.0% |
| **Zone 9** | | | | | | |
| **Stalbridge** | | | | | | |
| Dike & Son, Stalbridge | 0.9% | 0.9% | 1.4% | 0.9% | 0.0% | 5.0% |
| Other Stalbridge | 0.9% | 0.9% | 6.6% | 0.9% | 0.0% | 5.0% |
| **Sherborne** | | | | | | |
| Sainsbury's, Sherborne | 1.1% | 1.1% | 8.9% | 1.1% | 4.4% | 25.0% |
| Waitrose, Sherborne | 0.0% | 0.0% | 11.8% | 0.0% | 0.0% | 25.0% |
| Sherborne | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 15.0% |
| **Zone 11** | | | | | | |
| **Shaftesbury** | | | | | | |
| Co-op, Shaftesbury | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 25.0% |
| Tesco, Shaftesbury | 7.0% | 7.0% | 0.0% | 7.0% | 15.0% | 25.0% |
| Lidl, Shaftesbury (opened 2021) | 2.0% | 2.0% | 0.0% | 2.0% | 3.5% | 25.0% |
| Other Shaftesbury | 0.0% | 0.0% | 1.4% | 0.0% | 0.0% | 15.0% |
| Other Zone 11 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Zones 9, 10 and 11 sub-total** | **86.7%** | **86.7%** | **64.9%** | **86.7%** | **76.9%** | |
| **Blandford Forum** | | | | | | |
| Tesco, Blandford Forum | 2.4% | 2.4% | 0.0% | 2.4% | 0.0% | 65.0% |
| Marks & Spencer, Blandford Forum | 7.1% | 7.1% | 0.0% | 7.1% | 0.0% | 65.0% |
| Other Blandford Forum | 0.0% | 0.0% | 0.0% | 0.0% | 2.7% | 65.0% |
| **Wincanton** | | | | | | |
| Lidl, Wincanton | 0.7% | 0.7% | 4.3% | 0.7% | 4.3% | 55.0% |
| Morrison, Wincanton | 2.1% | 2.1% | 8.1% | 2.1% | 1.5% | 55.0% |
| Other Wincanton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 55.0% |
| **Yeovil** | | | | | | |
| Asda, Yeovil | 0.0% | 0.0% | 2.4% | 0.0% | 0.0% | 85.0% |
| Tesco Extra, Yeovil | 0.0% | 0.0% | 2.2% | 0.0% | 0.0% | 85.0% |
| Lidl, Yeovil | 0.0% | 0.0% | 4.8% | 0.0% | 0.0% | 85.0% |
| Morrisons, Yeovil | 0.0% | 0.0% | 9.0% | 0.0% | 0.0% | 85.0% |
| Other Yeovil | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 85.0% |
| | | | | | | |
| Elsewhere | 1.0% | 1.0% | 1.5% | 1.0% | 14.6% | 90.0% |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: NEMS Household Survey 2017 and Lichfields' adjustments for completions since 2017*

**Table 4C: Top-up food shopping - normal destination market shares (%)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow |
|---|---|---|---|---|---|---|
| **Zone 10** | | | | | | |
| **Marnhull** | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 30.0% | 10.0% | 0.0% | 1.0% | 0.0% | 5.0% |
| **Sturminster Newton** | | | | | | |
| Co-op, Sturminster Newton | 25.8% | 30.0% | 1.8% | 37.4% | 0.0% | 5.0% |
| Other Sturminster Newton | 2.6% | 5.7% | 2.8% | 3.9% | 2.0% | 5.0% |
| **Gillingham** | | | | | | |
| Asda, Gillingham | 5.4% | 8.0% | 0.0% | 7.9% | 0.0% | 20.0% |
| Lidl, Gillingham | 6.0% | 8.0% | 2.0% | 8.7% | 3.7% | 20.0% |
| Waitrose, Gillingham | 7.0% | 8.0% | 0.0% | 10.0% | 2.5% | 20.0% |
| Aldi, Gillingham (opened 2020) | 4.0% | 8.0% | 1.0% | 5.0% | 3.0% | 20.0% |
| Other Gillingham | 6.3% | 8.0% | 0.0% | 9.2% | 3.8% | 10.0% |
| Other Zone 10 | 5.6% | 7.0% | 0.0% | 8.1% | 0.0% | 5.0% |
| **Zone 9** | | | | | | |
| **Stalbridge** | | | | | | |
| Dike & Son, Stalbridge | 1.3% | 1.3% | 15.3% | 1.9% | 0.0% | 5.0% |
| Other Stalbridge | 0.0% | 0.0% | 9.9% | 0.0% | 0.0% | 5.0% |
| **Sherborne** | | | | | | |
| Sainsbury's, Sherborne | 1.3% | 1.3% | 10.1% | 1.9% | 0.0% | 25.0% |
| Waitrose, Sherborne | 0.0% | 0.0% | 8.0% | 0.0% | 0.0% | 25.0% |
| Sherborne | 0.0% | 0.0% | 15.0% | 0.0% | 0.0% | 15.0% |
| **Zone 11** | | | | | | |
| **Shaftesbury** | | | | | | |
| Co-op, Shaftesbury | 0.0% | 0.0% | 0.0% | 0.0% | 15.6% | 25.0% |
| Tesco, Shaftesbury | 0.0% | 0.0% | 2.5% | 0.0% | 17.0% | 25.0% |
| Lidl, Shaftesbury (opened 2021) | 0.0% | 0.0% | 0.0% | 0.0% | 4.0% | 25.0% |
| Other Shaftesbury | 0.0% | 0.0% | 0.0% | 0.0% | 6.0% | 15.0% |
| Other Zone 11 | 0.0% | 0.0% | 0.0% | 0.0% | 31.7% | 5.0% |
| **Zones 9, 10 and 11 sub-total** | **95.3%** | **95.3%** | **68.4%** | **95.0%** | **89.3%** | |
| **Blandford Forum** | | | | | | |
| Tesco, Blandford Forum | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 65.0% |
| Marks & Spencer, Blandford Forum | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 65.0% |
| Other Blandford Forum | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 65.0% |
| **Wincanton** | | | | | | |
| Lidl, Wincanton | 0.0% | 0.0% | 0.0% | 0.0% | 4.1% | 55.0% |
| Morrison, Wincanton | 1.7% | 1.7% | 17.6% | 1.8% | 1.2% | 55.0% |
| Other Wincanton | 1.8% | 1.8% | 0.0% | 1.9% | 1.3% | 55.0% |
| **Yeovil** | | | | | | |
| Asda, Yeovil | 0.0% | 0.0% | 4.8% | 0.0% | 0.0% | 85.0% |
| Tesco Extra, Yeovil | 0.0% | 0.0% | 1.4% | 0.0% | 0.0% | 85.0% |
| Lidl, Yeovil | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 85.0% |
| Morrisons, Yeovil | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 85.0% |
| Other Yeovil | 0.0% | 0.0% | 4.7% | 0.0% | 0.0% | 85.0% |
| | | | | | | |
| Elsewhere | 1.2% | 1.2% | 1.3% | 1.3% | 4.1% | 90.0% |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: NEMS Household Survey 2017 and Lichfields' adjustments for completions since 2017*

**Table 4D: Top-up food shopping - other regular destination market shares (%)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow |
|---|---|---|---|---|---|---|
| **Zone 10** | | | | | | |
| **Marnhull** | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Sturminster Newton** | | | | | | |
| Co-op, Sturminster Newton | 0.0% | 0.0% | 4.8% | 0.0% | 0.0% | 5.0% |
| Other Sturminster Newton | 8.1% | 8.0% | 4.8% | 8.4% | 0.0% | 5.0% |
| **Gillingham** | | | | | | |
| Asda, Gillingham | 13.0% | 12.0% | 0.0% | 13.0% | 0.0% | 20.0% |
| Lidl, Gillingham | 16.0% | 15.0% | 0.0% | 15.0% | 0.0% | 20.0% |
| Waitrose, Gillingham | 33.0% | 32.0% | 0.0% | 33.0% | 0.0% | 20.0% |
| Aldi, Gillingham (opened 2020) | 4.0% | 8.0% | 1.0% | 5.0% | 3.0% | 20.0% |
| Other Gillingham | 4.0% | 4.0% | 0.0% | 4.2% | 8.0% | 10.0% |
| Other Zone 10 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| **Zone 9** | | | | | | |
| **Stalbridge** | | | | | | |
| Dike & Son, Stalbridge | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.0% |
| Other Stalbridge | 3.1% | 3.0% | 0.0% | 3.0% | 0.0% | 5.0% |
| **Sherborne** | | | | | | |
| Sainsbury's, Sherborne | 0.0% | 0.0% | 23.4% | 0.0% | 0.0% | 25.0% |
| Waitrose, Sherborne | 0.0% | 0.0% | 29.0% | 0.0% | 0.0% | 25.0% |
| Sherborne | 0.0% | 0.0% | 6.5% | 0.0% | 0.0% | 15.0% |
| **Zone 11** | | | | | | |
| **Shaftesbury** | | | | | | |
| Co-op, Shaftesbury | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 25.0% |
| Tesco, Shaftesbury | 4.2% | 4.0% | 0.0% | 4.0% | 44.0% | 25.0% |
| Lidl, Shaftesbury (opened 2021) | 0.0% | 0.0% | 0.0% | 0.0% | 4.0% | 25.0% |
| Other Shaftesbury | 0.0% | 0.0% | 0.0% | 0.0% | 19.0% | 15.0% |
| Other Zone 11 | 0.0% | 0.0% | 0.0% | 0.0% | 10.4% | 5.0% |
| **Zones 9, 10 and 11 sub-total** | **85.4%** | **86.0%** | **69.5%** | **85.6%** | **88.4%** | |
| **Blandford Forum** | | | | | | |
| Tesco, Blandford Forum | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 65.0% |
| Marks & Spencer, Blandford Forum | 3.1% | 3.0% | 0.0% | 3.1% | 11.6% | 65.0% |
| Other Blandford Forum | 4.2% | 4.0% | 0.0% | 4.2% | 0.0% | 65.0% |
| **Wincanton** | | | | | | |
| Lidl, Wincanton | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 55.0% |
| Morrison, Wincanton | 4.2% | 4.0% | 0.0% | 4.0% | 0.0% | 55.0% |
| Other Wincanton | 3.1% | 3.0% | 0.0% | 3.1% | 0.0% | 55.0% |
| **Yeovil** | | | | | | |
| Asda, Yeovil | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 85.0% |
| Tesco Extra, Yeovil | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 85.0% |
| Lidl, Yeovil | 0.0% | 0.0% | 10.3% | 0.0% | 0.0% | 85.0% |
| Morrisons, Yeovil | 0.0% | 0.0% | 7.7% | 0.0% | 0.0% | 85.0% |
| Other Yeovil | 0.0% | 0.0% | 4.8% | 0.0% | 0.0% | 85.0% |
| | | | | | | |
| Elsewhere | 0.0% | 0.0% | 7.7% | 0.0% | 0.0% | 90.0% |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: NEMS Household Survey 2017 and Lichfields' adjustments for completions since 2017*

**Table 5A: Main-food shopping - normal destination expenditure flows (£M)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2025** | **3.16** | **2.08** | **47.44** | **34.54** | **30.15** | | **117.38** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.06 | 0.04 | 0.00 | 0.69 | 0.00 | 0.08 | **0.84** |
| Other Sturminster Newton | 0.04 | 0.03 | 0.00 | 0.48 | 0.00 | 0.06 | **0.59** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.33 | 0.22 | 0.00 | 3.63 | 1.24 | 1.57 | **6.77** |
| Lidl, Gillingham | 0.45 | 0.30 | 2.99 | 4.94 | 1.21 | 2.77 | **12.35** |
| Waitrose, Gillingham | 0.61 | 0.40 | 0.62 | 6.63 | 4.22 | 3.52 | **15.60** |
| Aldi, Gillingham (opened 2020) | 0.32 | 0.21 | 1.90 | 3.45 | 0.90 | 1.90 | **8.48** |
| Other Gillingham | 0.03 | 0.02 | 0.00 | 0.28 | 0.00 | 0.05 | **0.35** |
| Other Zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.00 | 0.00 | 2.23 | 0.00 | 0.00 | 0.12 | **2.35** |
| Other Stalbridge | 0.00 | 0.00 | 0.52 | 0.00 | 0.00 | 0.03 | **0.55** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.04 | 0.03 | 9.82 | 0.45 | 0.00 | 3.47 | **13.78** |
| Waitrose, Sherborne | 0.00 | 0.00 | 1.80 | 0.00 | 0.00 | 0.60 | **2.40** |
| Sherborne | 0.00 | 0.00 | 0.33 | 0.00 | 0.00 | 0.06 | **0.39** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 0.42 | 0.14 | **0.56** |
| Tesco, Shaftesbury | 0.13 | 0.09 | 1.42 | 1.45 | 11.16 | 4.84 | **19.00** |
| Lidl, Shaftesbury (opened 2021) | 0.03 | 0.02 | 0.47 | 0.35 | 6.03 | 2.32 | **9.20** |
| Other Shaftesbury | 0.02 | 0.01 | 0.00 | 0.21 | 0.00 | 0.05 | **0.28** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Zones 9, 10 and 11 sub-total** | **2.06** | **1.36** | **22.11** | **22.56** | **25.18** | **21.59** | **93.49** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.53 | 0.35 | 1.00 | 5.80 | 0.00 | 14.61 | **21.94** |
| Marks & Spencer, Blandford Forum | 0.02 | 0.01 | 0.00 | 0.21 | 0.00 | 0.46 | **0.68** |
| Other Blandford Forum | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.04 | 0.02 | 2.66 | 0.41 | 0.12 | 4.00 | **7.23** |
| Morrison, Wincanton | 0.14 | 0.09 | 7.16 | 1.49 | 0.63 | 11.71 | **21.13** |
| Other Wincanton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 2.61 | 0.00 | 0.00 | 14.79 | **17.40** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 3.61 | 0.00 | 0.00 | 20.43 | **24.04** |
| Lidl, Yeovil | 0.00 | 0.00 | 0.76 | 0.00 | 0.00 | 4.30 | **5.06** |
| Morrisons, Yeovil | 0.00 | 0.00 | 1.66 | 0.00 | 0.00 | 9.41 | **11.07** |
| Other Yeovil | 0.00 | 0.00 | 0.33 | 0.00 | 0.00 | 1.88 | **2.21** |
| | | | | | | | |
| Elsewhere | 0.37 | 0.25 | 5.55 | 4.08 | 4.22 | 130.44 | **144.67** |
| **TOTAL** | **3.16** | **2.08** | **47.44** | **34.54** | **30.15** | **233.62** | **348.92** |

*Source: Table 3A and Table 4A*

**Table 5B: Main-food shopping - other regular expenditure flows (£M)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2025** | **1.05** | **0.69** | **15.81** | **11.51** | **10.05** | | **39.13** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.01 | 0.01 | 0.00 | 0.14 | 0.00 | 0.02 | **0.17** |
| Other Sturminster Newton | 0.15 | 0.10 | 0.00 | 1.64 | 0.00 | 0.20 | **1.98** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.20 | 0.13 | 4.33 | 2.14 | 0.70 | 2.00 | **9.38** |
| Lidl, Gillingham | 0.19 | 0.12 | 0.70 | 2.06 | 1.51 | 1.27 | **5.72** |
| Waitrose, Gillingham | 0.09 | 0.06 | 0.00 | 0.94 | 2.11 | 0.86 | **4.00** |
| Aldi, Gillingham (opened 2020) | 0.14 | 0.09 | 0.47 | 1.50 | 1.11 | 0.92 | **4.13** |
| Other Gillingham | 0.01 | 0.01 | 0.00 | 0.09 | 0.00 | 0.02 | **0.12** |
| Other Zone 10 | 0.01 | 0.01 | 0.00 | 0.10 | 0.00 | 0.01 | **0.13** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.01 | 0.01 | 0.22 | 0.10 | 0.00 | 0.02 | **0.36** |
| Other Stalbridge | 0.01 | 0.01 | 1.04 | 0.10 | 0.00 | 0.07 | **1.22** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.01 | 0.01 | 1.41 | 0.13 | 0.44 | 0.67 | **2.66** |
| Waitrose, Sherborne | 0.00 | 0.00 | 1.87 | 0.00 | 0.00 | 0.62 | **2.49** |
| Sherborne | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Tesco, Shaftesbury | 0.07 | 0.05 | 0.00 | 0.81 | 1.51 | 0.86 | **3.25** |
| Lidl, Shaftesbury (opened 2021) | 0.02 | 0.01 | 0.00 | 0.23 | 0.35 | 0.22 | **0.82** |
| Other Shaftesbury | 0.00 | 0.00 | 0.22 | 0.00 | 0.00 | 0.04 | **0.26** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Zones 9, 10 and 11 sub-total** | **0.91** | **0.60** | **10.26** | **9.98** | **7.73** | **7.79** | **36.68** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.03 | 0.02 | 0.00 | 0.28 | 0.00 | 0.61 | **0.91** |
| Marks & Spencer, Blandford Forum | 0.07 | 0.05 | 0.00 | 0.82 | 0.00 | 1.80 | **2.69** |
| Other Blandford Forum | 0.00 | 0.00 | 0.00 | 0.00 | 0.27 | 0.50 | **0.78** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.01 | 0.00 | 0.68 | 0.08 | 0.43 | 1.48 | **2.68** |
| Morrison, Wincanton | 0.02 | 0.01 | 1.28 | 0.24 | 0.15 | 2.10 | **3.80** |
| Other Wincanton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 0.38 | 0.00 | 0.00 | 2.15 | **2.53** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 0.35 | 0.00 | 0.00 | 1.97 | **2.32** |
| Lidl, Yeovil | 0.00 | 0.00 | 0.76 | 0.00 | 0.00 | 4.30 | **5.06** |
| Morrisons, Yeovil | 0.00 | 0.00 | 1.42 | 0.00 | 0.00 | 8.07 | **9.49** |
| Other Yeovil | 0.00 | 0.00 | 0.44 | 0.00 | 0.00 | 2.51 | **2.95** |
| | | | | | | | |
| Elsewhere | 0.01 | 0.01 | 0.24 | 0.12 | 1.47 | 16.54 | **18.37** |
| **TOTAL** | **1.05** | **0.69** | **15.81** | **11.51** | **10.05** | **49.83** | **88.26** |

*Source: Table 3A and Table 4B*

**Table 5C: Top-up shopping - usual destination expenditure flows (£M)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2025** | **1.35** | **0.89** | **20.33** | **14.80** | **12.92** | | **50.30** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.41 | 0.09 | 0.00 | 0.15 | 0.00 | 0.12 | **0.68** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.35 | 0.27 | 0.37 | 5.54 | 0.00 | 0.61 | **6.86** |
| Other Sturminster Newton | 0.04 | 0.05 | 0.57 | 0.58 | 0.26 | 0.13 | **1.57** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.07 | 0.07 | 0.00 | 1.17 | 0.00 | 0.40 | **1.64** |
| Lidl, Gillingham | 0.08 | 0.07 | 0.41 | 1.29 | 0.48 | 0.65 | **2.91** |
| Waitrose, Gillingham | 0.09 | 0.07 | 0.00 | 1.48 | 0.32 | 0.56 | **2.46** |
| Aldi, Gillingham (opened 2020) | 0.05 | 0.07 | 0.20 | 0.74 | 0.39 | 0.44 | **1.82** |
| Other Gillingham | 0.09 | 0.07 | 0.00 | 1.36 | 0.49 | 0.29 | **2.23** |
| Other Zone 10 | 0.08 | 0.06 | 0.00 | 1.20 | 0.00 | 0.13 | **1.41** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.02 | 0.01 | 3.11 | 0.28 | 0.00 | 0.19 | **3.60** |
| Other Stalbridge | 0.00 | 0.00 | 2.01 | 0.00 | 0.00 | 0.11 | **2.12** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.02 | 0.01 | 2.05 | 0.28 | 0.00 | 0.80 | **3.15** |
| Waitrose, Sherborne | 0.00 | 0.00 | 1.63 | 0.00 | 0.00 | 0.54 | **2.17** |
| Sherborne | 0.00 | 0.00 | 3.05 | 0.00 | 0.00 | 0.54 | **3.59** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 2.02 | 0.67 | **2.69** |
| Tesco, Shaftesbury | 0.00 | 0.00 | 0.51 | 0.00 | 2.20 | 0.90 | **3.61** |
| Lidl, Shaftesbury (opened 2021) | 0.00 | 0.00 | 0.00 | 0.00 | 0.52 | 0.17 | **0.69** |
| Other Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 0.78 | 0.14 | **0.91** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 4.10 | 0.22 | **4.31** |
| **Zones 9, 10 and 11 sub-total** | **1.29** | **0.85** | **13.91** | **14.06** | **11.54** | **7.62** | **48.42** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Marks & Spencer, Blandford Forum | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Other Blandford Forum | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.00 | 0.00 | 0.00 | 0.00 | 0.53 | 0.65 | **1.18** |
| Morrison, Wincanton | 0.02 | 0.02 | 3.58 | 0.27 | 0.16 | 4.95 | **8.97** |
| Other Wincanton | 0.02 | 0.02 | 0.00 | 0.28 | 0.17 | 0.61 | **1.09** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 0.98 | 0.00 | 0.00 | 5.53 | **6.51** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 0.28 | 0.00 | 0.00 | 1.61 | **1.90** |
| Lidl, Yeovil | 0.00 | 0.00 | 0.37 | 0.00 | 0.00 | 2.07 | **2.44** |
| Morrisons, Yeovil | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Other Yeovil | 0.00 | 0.00 | 0.96 | 0.00 | 0.00 | 5.42 | **6.37** |
| | | | | | | | |
| Elsewhere | 0.02 | 0.01 | 0.26 | 0.19 | 0.53 | 9.13 | **10.14** |
| **TOTAL** | **1.35** | **0.89** | **20.33** | **14.80** | **12.92** | **37.59** | **87.01** |

*Source: Table 3A and Table 4C*

**Table 5D: Top-up shopping - other regular destination expenditure flows (£M)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2025** | **0.45** | **0.30** | **6.78** | **4.93** | **4.31** | | **16.77** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.00 | 0.00 | 0.33 | 0.00 | 0.00 | 0.02 | **0.34** |
| Other Sturminster Newton | 0.04 | 0.02 | 0.33 | 0.41 | 0.00 | 0.07 | **0.84** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.06 | 0.04 | 0.00 | 0.64 | 0.00 | 0.22 | **0.92** |
| Lidl, Gillingham | 0.07 | 0.04 | 0.00 | 0.74 | 0.00 | 0.26 | **1.07** |
| Waitrose, Gillingham | 0.15 | 0.09 | 0.00 | 1.63 | 0.00 | 0.56 | **2.34** |
| Aldi, Gillingham (opened 2020) | 0.02 | 0.02 | 0.07 | 0.25 | 0.13 | 0.15 | **0.61** |
| Other Gillingham | 0.02 | 0.01 | 0.00 | 0.21 | 0.34 | 0.08 | **0.65** |
| Other Zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Other Stalbridge | 0.01 | 0.01 | 0.00 | 0.15 | 0.00 | 0.02 | **0.18** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.00 | 0.00 | 1.59 | 0.00 | 0.00 | 0.53 | **2.11** |
| Waitrose, Sherborne | 0.00 | 0.00 | 1.97 | 0.00 | 0.00 | 0.66 | **2.62** |
| Sherborne | 0.00 | 0.00 | 0.44 | 0.00 | 0.00 | 0.08 | **0.52** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Tesco, Shaftesbury | 0.02 | 0.01 | 0.00 | 0.20 | 1.90 | 0.72 | **2.83** |
| Lidl, Shaftesbury (opened 2021) | 0.00 | 0.00 | 0.00 | 0.00 | 0.17 | 0.06 | **0.23** |
| Other Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 0.82 | 0.14 | **0.96** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.45 | 0.02 | **0.47** |
| **Zones 9, 10 and 11 sub-total** | **0.39** | **0.26** | **4.71** | **4.22** | **3.81** | **3.57** | **16.70** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Marks & Spencer, Blandford Forum | 0.01 | 0.01 | 0.00 | 0.15 | 0.50 | 1.26 | **1.93** |
| Other Blandford Forum | 0.02 | 0.01 | 0.00 | 0.21 | 0.00 | 0.45 | **0.68** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Morrison, Wincanton | 0.02 | 0.01 | 0.00 | 0.20 | 0.00 | 0.29 | **0.51** |
| Other Wincanton | 0.01 | 0.01 | 0.00 | 0.15 | 0.00 | 0.22 | **0.39** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | **0.00** |
| Lidl, Yeovil | 0.00 | 0.00 | 0.70 | 0.00 | 0.00 | 3.96 | **4.65** |
| Morrisons, Yeovil | 0.00 | 0.00 | 0.52 | 0.00 | 0.00 | 2.96 | **3.48** |
| Other Yeovil | 0.00 | 0.00 | 0.33 | 0.00 | 0.00 | 1.84 | **2.17** |
| | | | | | | | |
| Elsewhere | 0.00 | 0.00 | 0.52 | 0.00 | 0.00 | 4.70 | **5.22** |
| **TOTAL** | **0.45** | **0.30** | **6.78** | **4.93** | **4.31** | **19.26** | **35.73** |

*Source: Table 3A and Table 4C*

**Table 5E: Combined main and top-up shopping expenditure flows (£M)**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2025** | **6.02** | **3.96** | **90.37** | **65.80** | **57.43** | | **223.58** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| Spar/Robin Hill Stores, Marnhull | 0.41 | 0.09 | 0.00 | 0.15 | 0.00 | 0.12 | **0.77** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.42 | 0.32 | 0.69 | 6.35 | 0.00 | 0.73 | **8.50** |
| Other Sturminster Newton | 0.29 | 0.22 | 0.89 | 3.41 | 0.26 | 0.49 | **5.56** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.68 | 0.46 | 5.20 | 7.77 | 2.00 | 4.49 | **20.60** |
| Lidl, Gillingham | 0.80 | 0.54 | 4.03 | 9.11 | 3.41 | 5.02 | **22.92** |
| Waitrose, Gillingham | 0.91 | 0.61 | 0.58 | 10.43 | 6.80 | 5.44 | **24.76** |
| Aldi, Gillingham (opened 2020) | 0.53 | 0.40 | 2.61 | 6.01 | 2.69 | 3.46 | **15.69** |
| Other Gillingham | 0.12 | 0.09 | 0.00 | 1.73 | 0.49 | 0.36 | **2.80** |
| Other Zone 10 | 0.09 | 0.07 | 0.00 | 1.32 | 0.00 | 0.15 | **1.63** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.03 | 0.02 | 5.46 | 0.41 | 0.00 | 0.33 | **6.24** |
| Other Stalbridge | 0.03 | 0.02 | 3.75 | 0.27 | 0.00 | 0.23 | **4.30** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.07 | 0.05 | 14.49 | 0.85 | 0.53 | 5.38 | **21.37** |
| Waitrose, Sherborne | 0.00 | 0.00 | 7.51 | 0.00 | 0.00 | 2.50 | **10.02** |
| Sherborne | 0.00 | 0.00 | 3.80 | 0.00 | 0.00 | 0.67 | **4.47** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 2.41 | 0.80 | **3.21** |
| Tesco, Shaftesbury | 0.23 | 0.15 | 1.84 | 2.52 | 16.31 | 7.17 | **28.22** |
| Lidl, Shaftesbury (opened 2021) | 0.05 | 0.04 | 0.44 | 0.60 | 6.74 | 2.66 | **10.53** |
| Other Shaftesbury | 0.02 | 0.01 | 0.27 | 0.19 | 1.59 | 0.38 | **2.46** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 4.54 | 0.24 | **4.78** |
| **Zones 9, 10 and 11 sub-total** | **4.68** | **3.08** | **51.57** | **51.11** | **47.78** | **40.61** | **198.83** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.53 | 0.35 | 0.93 | 5.75 | 0.00 | 14.37 | **21.92** |
| Marks & Spencer, Blandford Forum | 0.12 | 0.08 | 0.00 | 1.33 | 0.50 | 3.85 | **5.87** |
| Other Blandford Forum | 0.02 | 0.01 | 0.00 | 0.21 | 0.33 | 1.06 | **1.62** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.04 | 0.03 | 3.30 | 0.48 | 1.16 | 6.16 | **11.17** |
| Morrison, Wincanton | 0.20 | 0.13 | 11.80 | 2.14 | 0.93 | 18.70 | **33.89** |
| Other Wincanton | 0.04 | 0.02 | 0.00 | 0.43 | 0.17 | 0.84 | **1.50** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 3.87 | 0.00 | 0.00 | 21.91 | **25.78** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 4.07 | 0.00 | 0.00 | 23.05 | **27.12** |
| Lidl, Yeovil | 0.00 | 0.00 | 2.68 | 0.00 | 0.00 | 15.21 | **17.89** |
| Morrisons, Yeovil | 0.00 | 0.00 | 3.78 | 0.00 | 0.00 | 21.42 | **25.20** |
| Other Yeovil | 0.00 | 0.00 | 2.12 | 0.00 | 0.00 | 12.03 | **14.15** |
| | | | | | | | |
| Elsewhere | 0.38 | 0.25 | 6.25 | 4.14 | 6.23 | 155.43 | **172.67** |
| **TOTAL** | **6.00** | **3.94** | **90.37** | **65.59** | **57.09** | **334.61** | **557.61** |

*Source: Tables 5A to 5D*

**Table 6: Combined 2030 main and top-up shopping expenditure flows (£M) - without appeal proposals**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2030** | **7.91** | **3.91** | **91.00** | **65.45** | **57.34** | | **225.61** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| Spar / Robin Hill Stores, Marnhull | 0.53 | 0.09 | 0.00 | 0.15 | 0.00 | 0.13 | **0.90** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.56 | 0.31 | 0.70 | 6.33 | 0.00 | 0.73 | **8.63** |
| Other Sturminster Newton | 0.35 | 0.20 | 0.90 | 3.09 | 0.26 | 0.45 | **5.25** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.87 | 0.45 | 4.36 | 7.54 | 1.94 | 4.24 | **19.39** |
| Lidl, Gillingham | 1.04 | 0.53 | 4.12 | 8.98 | 3.19 | 5.00 | **22.86** |
| Waitrose, Gillingham | 1.23 | 0.61 | 0.62 | 10.63 | 6.64 | 5.55 | **25.29** |
| Aldi, Gillingham (opened 2020) | 0.69 | 0.39 | 2.66 | 5.91 | 2.52 | 3.43 | **15.60** |
| Other Gillingham | 0.18 | 0.10 | 0.00 | 1.93 | 0.83 | 0.44 | **3.49** |
| Other Zone 10 | 0.11 | 0.07 | 0.00 | 1.30 | 0.00 | 0.15 | **1.62** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.04 | 0.02 | 5.60 | 0.38 | 0.00 | 0.34 | **6.37** |
| Other Stalbridge | 0.03 | 0.01 | 3.60 | 0.25 | 0.00 | 0.22 | **4.12** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.09 | 0.05 | 14.97 | 0.85 | 0.44 | 5.51 | **21.92** |
| Waitrose, Sherborne | 0.00 | 0.00 | 7.31 | 0.00 | 0.00 | 2.44 | **9.75** |
| Sherborne | 0.00 | 0.00 | 3.85 | 0.00 | 0.00 | 0.68 | **4.53** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 2.43 | 0.81 | **3.25** |
| Tesco, Shaftesbury | 0.30 | 0.15 | 1.95 | 2.44 | 16.73 | 7.33 | **28.89** |
| Lidl, Shaftesbury (opened 2021) | 0.07 | 0.03 | 0.48 | 0.57 | 7.06 | 2.77 | **10.99** |
| Other Shaftesbury | 0.02 | 0.01 | 0.22 | 0.21 | 1.59 | 0.38 | **2.43** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 4.54 | 0.24 | **4.78** |
| **Zones 9, 10 and 11 sub-total** | **6.12** | **3.02** | **51.35** | **50.56** | **48.17** | **40.83** | **200.05** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.73 | 0.36 | 1.00 | 6.05 | 0.00 | 15.48 | **23.63** |
| Marks & Spencer, Blandford Forum | 0.14 | 0.07 | 0.00 | 1.17 | 0.50 | 3.56 | **5.45** |
| Other Blandford Forum | 0.02 | 0.01 | 0.00 | 0.21 | 0.27 | 0.97 | **1.48** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.06 | 0.03 | 3.36 | 0.49 | 1.08 | 6.17 | **11.19** |
| Morrison, Wincanton | 0.26 | 0.13 | 12.11 | 2.18 | 0.94 | 19.22 | **34.83** |
| Other Wincanton | 0.05 | 0.02 | 0.00 | 0.43 | 0.17 | 0.85 | **1.52** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 3.99 | 0.00 | 0.00 | 22.62 | **26.62** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 4.27 | 0.00 | 0.00 | 24.18 | **28.45** |
| Lidl, Yeovil | 0.00 | 0.00 | 2.60 | 0.00 | 0.00 | 14.73 | **17.34** |
| Morrisons, Yeovil | 0.00 | 0.00 | 3.63 | 0.00 | 0.00 | 20.57 | **24.21** |
| Other Yeovil | 0.00 | 0.00 | 2.07 | 0.00 | 0.00 | 11.73 | **13.80** |
| | | | | | | | |
| Elsewhere | 0.53 | 0.26 | 6.62 | 4.36 | 6.21 | 162.03 | **180.00** |
| **TOTAL** | **7.91** | **3.91** | **91.00** | **65.45** | **57.34** | **342.95** | **568.56** |

*Source: Tables 3 and 5D*

**Table 7A: Proposed food store's convenience and comparison goods turnover**

| | Net sales (sq.m) | Convenience goods sales (sq.m) | Comparison goods sales (sq.m) | Convenience turnover density (£/p.s.m) | Comparison turnover density (£/p.s.m) | Convenience turnover (£m) | Comparison turnover (£m) | Total turnover (£m) |
|---|---|---|---|---|---|---|---|---|
| *Proposed store* | 814 | 733 | 81 | £11,000 | £6,500 | £8.06 | £0.53 | **£8.59** |

**Table 7B: Proposed food store's convenience goods trade draw**

| | Marnhull 0 - 2 km | Marnhull 2 - 4 km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| % trade draw | 45.0% | 18.0% | 16.0% | 11.0% | 5.0% | 5.0% | **100.0%** |
| £M trade draw | £3.63 | £1.45 | £1.29 | £0.89 | £0.40 | £0.40 | **£8.06** |

**Table 8: Combined 2030 main and top-up shopping expenditure flows (£M) - with appeal proposals**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2030** | **7.91** | **3.91** | **91.00** | **65.45** | **57.34** | | **225.61** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| *Appeal food store* | *3.63* | *1.45* | *1.29* | *0.89* | *0.40* | *0.40* | ***8.06*** |
| Spar / Robin Hill Stores, Marnhull | 0.37 | 0.07 | 0.00 | 0.15 | 0.00 | 0.13 | **0.72** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.06 | 0.09 | 0.67 | 6.17 | 0.00 | 0.72 | **7.71** |
| Other Sturminster Newton | 0.24 | 0.15 | 0.89 | 3.07 | 0.26 | 0.45 | **5.06** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.35 | 0.24 | 4.24 | 7.41 | 1.92 | 4.21 | **18.37** |
| Lidl, Gillingham | 0.42 | 0.28 | 4.00 | 8.83 | 3.16 | 4.97 | **21.66** |
| Waitrose, Gillingham | 0.50 | 0.32 | 0.60 | 10.45 | 6.58 | 5.52 | **23.98** |
| Aldi, Gillingham (opened 2020) | 0.28 | 0.21 | 2.59 | 5.81 | 2.50 | 3.41 | **14.79** |
| Other Gillingham | 0.13 | 0.08 | 0.00 | 1.91 | 0.83 | 0.44 | **3.39** |
| Other Zone 10 | 0.08 | 0.05 | 0.00 | 1.28 | 0.00 | 0.15 | **1.56** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.00 | 0.01 | 5.37 | 0.37 | 0.00 | 0.33 | **6.08** |
| Other Stalbridge | 0.02 | 0.01 | 3.55 | 0.25 | 0.00 | 0.22 | **4.05** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.06 | 0.03 | 14.76 | 0.85 | 0.44 | 5.50 | **21.65** |
| Waitrose, Sherborne | 0.00 | 0.00 | 7.21 | 0.00 | 0.00 | 2.43 | **9.64** |
| Sherborne | 0.00 | 0.00 | 3.82 | 0.00 | 0.00 | 0.68 | **4.50** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 2.41 | 0.81 | **3.22** |
| Tesco, Shaftesbury | 0.12 | 0.08 | 1.89 | 2.40 | 16.57 | 7.29 | **28.35** |
| Lidl, Shaftesbury (opened 2021) | 0.03 | 0.02 | 0.46 | 0.56 | 6.99 | 2.76 | **10.82** |
| Other Shaftesbury | 0.02 | 0.01 | 0.22 | 0.21 | 1.59 | 0.37 | **2.42** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 4.53 | 0.24 | **4.76** |
| **Zones 9, 10 and 11 sub-total** | **6.31** | **3.10** | **51.57** | **50.60** | **48.18** | **41.03** | **200.80** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.62 | 0.32 | 1.00 | 6.02 | 0.00 | 15.46 | **23.42** |
| Marks & Spencer, Blandford Forum | 0.12 | 0.06 | 0.00 | 1.17 | 0.50 | 3.56 | **5.41** |
| Other Blandford Forum | 0.02 | 0.01 | 0.00 | 0.21 | 0.27 | 0.97 | **1.48** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.05 | 0.03 | 3.34 | 0.49 | 1.08 | 6.16 | **11.14** |
| Morrison, Wincanton | 0.22 | 0.11 | 12.02 | 2.17 | 0.94 | 19.19 | **34.66** |
| Other Wincanton | 0.05 | 0.02 | 0.00 | 0.43 | 0.17 | 0.85 | **1.52** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 3.96 | 0.00 | 0.00 | 22.59 | **26.56** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 4.24 | 0.00 | 0.00 | 24.15 | **28.39** |
| Lidl, Yeovil | 0.00 | 0.00 | 2.58 | 0.00 | 0.00 | 14.71 | **17.30** |
| Morrisons, Yeovil | 0.00 | 0.00 | 3.61 | 0.00 | 0.00 | 20.55 | **24.15** |
| Other Yeovil | 0.00 | 0.00 | 2.06 | 0.00 | 0.00 | 11.72 | **13.79** |
| Elsewhere | 0.52 | 0.26 | 6.62 | 4.36 | 6.21 | 162.00 | **179.96** |
| **TOTAL** | **7.91** | **3.91** | **91.00** | **65.45** | **57.34** | **342.95** | **568.56** |

*Source: Tables 6A to 6C*

**Table 9: Combined 2035 main and top-up shopping expenditure flows (£M) - with appeal proposals**

| Destination | Marnhull 0-2km | Marnhull 2-4km | Zone 9 | Zone 10 | Zone 11 | Inflow | Total |
|---|---|---|---|---|---|---|---|
| **Expenditure 2035** | **7.90** | **3.87** | **91.72** | **68.95** | **57.51** | | **229.95** |
| **Zone 10** | | | | | | | |
| **Marnhull** | | | | | | | |
| *Appeal food store* | *3.62* | *1.44* | *1.30* | *0.93* | *0.40* | *0.41* | ***8.11*** |
| Spar / Robin Hill Stores, Marnhull | 0.37 | 0.07 | 0.00 | 0.15 | 0.00 | 0.13 | ***0.73*** |
| **Sturminster Newton** | | | | | | | |
| Co-op, Sturminster Newton | 0.06 | 0.09 | 0.67 | 6.50 | 0.00 | 0.74 | ***8.06*** |
| Other Sturminster Newton | 0.24 | 0.15 | 0.90 | 3.23 | 0.26 | 0.46 | ***5.24*** |
| **Gillingham** | | | | | | | |
| Asda, Gillingham | 0.35 | 0.23 | 4.28 | 7.81 | 1.92 | 4.29 | ***18.89*** |
| Lidl, Gillingham | 0.42 | 0.28 | 4.04 | 9.30 | 3.17 | 5.06 | ***22.27*** |
| Waitrose, Gillingham | 0.49 | 0.32 | 0.61 | 11.01 | 6.60 | 5.63 | ***24.66*** |
| Aldi, Gillingham (opened 2020) | 0.28 | 0.20 | 2.61 | 6.12 | 2.51 | 3.48 | ***15.19*** |
| Other Gillingham | 0.13 | 0.08 | 0.00 | 2.01 | 0.83 | 0.45 | ***3.50*** |
| Other Zone 10 | 0.08 | 0.05 | 0.00 | 1.35 | 0.00 | 0.15 | ***1.63*** |
| **Zone 9** | | | | | | | |
| **Stalbridge** | | | | | | | |
| Dike & Son, Stalbridge | 0.00 | 0.01 | 5.41 | 0.39 | 0.00 | 0.34 | ***6.15*** |
| Other Stalbridge | 0.02 | 0.01 | 3.58 | 0.26 | 0.00 | 0.22 | ***4.10*** |
| **Sherborne** | | | | | | | |
| Sainsbury's, Sherborne | 0.06 | 0.03 | 14.88 | 0.89 | 0.44 | 5.60 | ***21.91*** |
| Waitrose, Sherborne | 0.00 | 0.00 | 7.27 | 0.00 | 0.00 | 2.48 | ***9.74*** |
| Sherborne | 0.00 | 0.00 | 3.85 | 0.00 | 0.00 | 0.69 | ***4.54*** |
| **Zone 11** | | | | | | | |
| **Shaftesbury** | | | | | | | |
| Co-op, Shaftesbury | 0.00 | 0.00 | 0.00 | 0.00 | 2.42 | 0.82 | ***3.24*** |
| Tesco, Shaftesbury | 0.12 | 0.08 | 1.91 | 2.53 | 16.62 | 7.43 | ***28.68*** |
| Lidl, Shaftesbury (opened 2021) | 0.03 | 0.02 | 0.47 | 0.59 | 7.02 | 2.81 | ***10.93*** |
| Other Shaftesbury | 0.02 | 0.01 | 0.22 | 0.22 | 1.59 | 0.38 | ***2.45*** |
| Other Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 4.54 | 0.24 | ***4.78*** |
| **Zones 9, 10 and 11 sub-total** | **6.30** | **3.07** | **51.98** | **53.31** | **48.32** | **41.82** | **204.81** |
| **Blandford Forum** | | | | | | | |
| Tesco, Blandford Forum | 0.62 | 0.32 | 1.00 | 6.34 | 0.00 | 15.76 | ***24.05*** |
| Marks & Spencer, Blandford Forum | 0.12 | 0.06 | 0.00 | 1.23 | 0.50 | 3.63 | ***5.54*** |
| Other Blandford Forum | 0.02 | 0.01 | 0.00 | 0.22 | 0.27 | 0.98 | ***1.51*** |
| **Wincanton** | | | | | | | |
| Lidl, Wincanton | 0.05 | 0.03 | 3.36 | 0.52 | 1.08 | 6.28 | ***11.32*** |
| Morrison, Wincanton | 0.22 | 0.11 | 12.12 | 2.29 | 0.94 | 19.56 | ***35.24*** |
| Other Wincanton | 0.05 | 0.02 | 0.00 | 0.45 | 0.17 | 0.87 | ***1.56*** |
| **Yeovil** | | | | | | | |
| Asda, Yeovil | 0.00 | 0.00 | 4.00 | 0.00 | 0.00 | 23.03 | ***27.02*** |
| Tesco Extra, Yeovil | 0.00 | 0.00 | 4.27 | 0.00 | 0.00 | 24.62 | ***28.89*** |
| Lidl, Yeovil | 0.00 | 0.00 | 2.60 | 0.00 | 0.00 | 15.00 | ***17.60*** |
| Morrisons, Yeovil | 0.00 | 0.00 | 3.63 | 0.00 | 0.00 | 20.94 | ***24.58*** |
| Other Yeovil | 0.00 | 0.00 | 2.08 | 0.00 | 0.00 | 11.95 | ***14.03*** |
| | | | | | | | |
| Elsewhere | 0.52 | 0.25 | 6.67 | 4.59 | 6.23 | 165.12 | ***183.38*** |
| **TOTAL** | **7.90** | **3.87** | **91.72** | **68.95** | **57.51** | **349.55** | **579.50** |

*Source: Tables 3C and 8*

**Table 10: Convenience goods Impact summary**

| Location | 2025 base year turnover £m | 2030 design year no development turnover £m | 2030 design year with appeal proposal turnover £m | 2030 trade diversion £m | % impact |
|---|---|---|---|---|---|
| | A | B | C | D | E |
| **Zone 10** | | | | | |
| **Marnhull** | | | | | |
| Appeal food store | n/a | n/a | 8.06 | n/a | n/a |
| Spar / Robin Hill Stores, Marnhull | 0.77 | 0.90 | 0.72 | -0.18 | -20.3% |
| **Sturminster Newton** | | | | | |
| Co-op, Sturminster Newton | 8.53 | 8.63 | 7.71 | -0.92 | -10.6% |
| Other Sturminster Newton | 5.18 | 5.25 | 5.06 | -0.19 | -3.7% |
| **Gillingham** | | | | | |
| Asda, Gillingham | 19.16 | 19.39 | 18.37 | -1.02 | -5.3% |
| Lidl, Gillingham | 22.59 | 22.86 | 21.66 | -1.20 | -5.2% |
| Waitrose, Gillingham | 25.02 | 25.29 | 23.98 | -1.31 | -5.2% |
| Aldi, Gillingham (opened 2020) | 15.43 | 15.60 | 14.79 | -0.81 | -5.2% |
| Other Gillingham | 3.46 | 3.49 | 3.39 | -0.10 | -2.9% |
| Other Zone 10 | 1.60 | 1.62 | 1.56 | -0.06 | -3.8% |
| **Zone 9** | | | | | |
| **Stalbridge** | | | | | |
| Dike & Son, Stalbridge | 6.33 | 6.37 | 6.08 | -0.29 | -4.6% |
| Other Stalbridge | 4.09 | 4.12 | 4.05 | -0.07 | -1.6% |
| **Sherborne** | | | | | |
| Sainsbury's, Sherborne | 21.76 | 21.92 | 21.65 | -0.27 | -1.2% |
| Waitrose, Sherborne | 9.68 | 9.75 | 9.64 | -0.11 | -1.1% |
| Sherborne | 4.50 | 4.53 | 4.50 | -0.03 | -0.6% |
| **Zone 11** | | | | | |
| **Shaftesbury** | | | | | |
| Co-op, Shaftesbury | 3.25 | 3.25 | 3.22 | -0.03 | -0.8% |
| Tesco, Shaftesbury | 28.83 | 28.89 | 28.35 | -0.54 | -1.9% |
| Lidl, Shaftesbury | 10.98 | 10.99 | 10.82 | -0.16 | -1.5% |
| Other Shaftesbury | 2.43 | 2.43 | 2.42 | -0.01 | -0.5% |
| Other Zone 11 | 4.78 | 4.78 | 4.76 | -0.01 | -0.2% |
| **Zones 9, 10 and 11 sub-total** | **198.36** | **200.05** | **200.80** | **-7.31** | **-3.7%** |
| **Blandford Forum** | | | | | |
| Tesco, Blandford Forum | 23.22 | 23.63 | 23.42 | -0.21 | -0.9% |
| Marks & Spencer, Blandford Forum | 5.37 | 5.45 | 5.41 | -0.04 | -0.7% |
| Other Blandford Forum | 1.47 | 1.48 | 1.48 | 0.00 | -0.3% |
| **Wincanton** | | | | | |
| Lidl, Wincanton | 11.12 | 11.19 | 11.14 | -0.05 | -0.4% |
| Morrison, Wincanton | 34.54 | 34.83 | 34.66 | -0.18 | -0.5% |
| Other Wincanton | 1.50 | 1.52 | 1.52 | -0.01 | -0.5% |
| **Yeovil** | | | | | |
| Asda, Yeovil | 26.43 | 26.62 | 26.56 | -0.06 | -0.2% |
| Tesco Extra, Yeovil | 28.25 | 28.45 | 28.39 | -0.06 | -0.2% |
| Lidl, Yeovil | 17.22 | 17.34 | 17.30 | -0.04 | -0.2% |
| Morrisons, Yeovil | 24.04 | 24.21 | 24.15 | -0.05 | -0.2% |
| Other Yeovil | 13.71 | 13.80 | 13.79 | -0.02 | -0.1% |
| | | | | | |
| Elsewhere | 178.66 | 180.00 | 179.96 | -0.04 | 0.0% |
| **Total** | **563.88** | **568.56** | **568.56** | **-8.06** | |

*Source: Tables 5D to 8*