

1. Introduction

- 1.1 Through Government guidance and advice, Local Planning Authorities (LPA) are recommended to produce a robust evidence base in support of their spatial planning strategy¹ for the area.
- 1.2 This is a report of a study which responds to requirements in Planning Policy Statement Note 4 “Planning for Sustainable Economic Growth” (PPS4)² and those implied in the draft National Planning Policy Framework³.
- 1.3 It has sought better to understand the current economic health and future supply, demand and needs of the area’s town and village centres and the people who use them, with a focus on retail uses. From this information, planning policies for town and village centres and the main uses within them can be identified and tested.

Report Structure

- 1.4 The main body of this report sets the context for the study and sets out the main findings for each of the main settlements (Minehead, Watchet and Williton) and the villages. Detailed information is retained in the Appendices. The report is structured as follows:

Executive Summary

Context

1. Introduction
2. National Policy Guidance
3. Strategic Policy, Strategies and Guidance
4. Local Policies, Strategies and Research
5. Local Projects and Initiatives
6. Social, Economic and Demographic Characteristics in Brief

Key Findings

7. Key Findings for Minehead, Watchet, Williton and the Villages

Appendices

- A1 Glossary and Bibliography
- A2 West Somerset Profile
- A3 Minehead Health Check
- A4 Watchet Health Check

¹ At the time of drafting this report this means the Local Development Framework Core Strategy. Under requirements introduced by the Localism Bill and draft National Planning Policy Framework, it means a Local Plan.

² See

<http://www.communities.gov.uk/planningandbuilding/planningsystem/planningpolicy/planningpolicystatements/pps4/>

³ See

<http://www.communities.gov.uk/planningandbuilding/planningsystem/planningpolicy/planningpolicyframework/>

A5 Williton Health Check

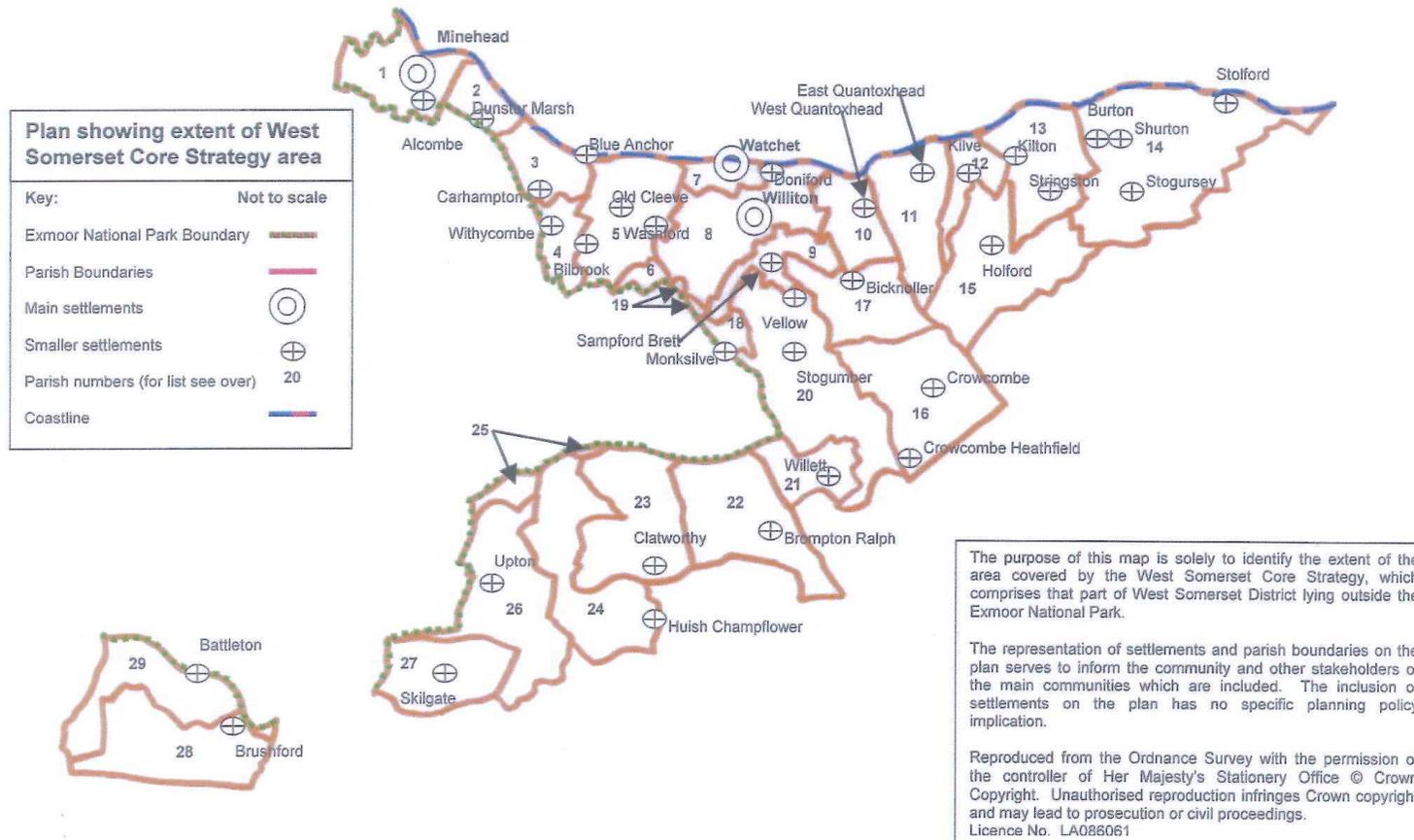
A6 Quantitative Needs Assessment – Consultants' Full Report

Extent of the Study Area

- 1.5 In the West Somerset Council area, the Council is the LPA for the area of the District outside of Exmoor National Park, which is an LPA in its own right and has responsibilities for planning within its boundaries. The extent of the West Somerset Local Planning Authority Area is shown in Figure 1.1 overleaf. Given the close relationship between the two LPA areas, it has been essential to work jointly with Exmoor National Park Authority so that the functional and spatial interdependencies of the two areas are reflected as the evidence base, and ultimately the policies of the respective Core Strategies, are developed. As part of this study, West Somerset Council commissioned a joint assessment with Exmoor National Park Authority to identify and analyse the quantitative retail and recreational leisure needs and demands of both areas.
- 1.6 The study includes analysis of the town and village centres in the West Somerset LPA area identified in the Core Strategy Options Paper⁴. However, it focuses principally on those places which have the main shopping and service offer and which are the main centres of population, i.e. Minehead, Watchet and Williton. Other smaller settlements have also been appraised, but in less detail. The level of analysis for each settlement is relative to the amount of information and data available for its size and function. Larger settlements tend to have more data readily available than smaller settlements.

⁴ See chapter 4 for further details.

Figure 1.1 – West Somerset Local Planning Authority Area



Key to Parishes shown on the Plan showing the extent of the West Somerset Core Strategy area.

West Somerset Parishes lying entirely outside the Exmoor National Park

| Core strategy extent map no. | Parish | Main Settlements |
|------------------------------|-------------------|--------------------------------------|
| 17 | Bicknoller | Bicknoller |
| 22 | Brompton Ralph | Brompton Ralph |
| 28 | Brushford | Brushford |
| 23 | Clatworthy | Clatworthy |
| 16 | Crowcombe | Crowcombe, Crowcombe Heathfield |
| 11 | East Quantoxhead | East Quantoxhead |
| 15 | Holford | Holford |
| 24 | Huish Champflower | Huish Champflower |
| 12 | Kilve | Kilve |
| 9 | Sampford Brett | Sampford Brett |
| 14 | Stogursey | Stogursey, Burton, Shurton, Stolford |
| 13 | Stringston | Stringston, Kilton |
| 7 | Watchet | Watchet |
| 10 | West Quantoxhead | West Quantoxhead |
| 8 | Williton | Williton, Doniford |

West Somerset Parishes lying partly within Exmoor National Park

| Core strategy extent map no. | Parish | Main Settlements outside Exmoor National Park |
|------------------------------|----------------|--|
| 25 | Brompton Regis | None |
| 3 | Carhampton | Carhampton, Blue Anchor |
| 29 | Dulverton | Battleton (south of road) |
| 2 | Dunster | Dunster Marsh |
| 21 | Elworthy | Willett |
| 1 | Minehead | Minehead, Alcombe |
| 18 | Monksilver | Monksilver (the part to the north east of the main street) |
| 19 | Nettlecombe | None |
| 5 | Old Cleeve | Old Cleeve, Washford, Bilbrook |
| 27 | Skilgate | Skilgate |
| 20 | Stogumber | Stogumber, Vellow |
| 26 | Upton | Upton |
| 4 | Withycombe | Withycombe |

Definitions

- 1.7 PPS4 gives definitions of “town” and other centres, which are reproduced in the Glossary to this report. However, in summary, the guidance covers all types of centre commonly referred to: city, town, district and local centres, and small parades of shops. Village centres usually fit into the Government’s definition of district or local centres in terms of the types and range of facilities and services on offer. The guidance also defines types of location including primary shopping areas, frontage, edge of centre and out of town.
- 1.8 The guidance defines “main town centre uses”, which should be included in town centre assessments as:
- i) retail development (including warehouse clubs and factory outlet centres);
 - ii) leisure, entertainment facilities, and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls);
 - iii) offices, and,
 - iv) arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
- 1.9 It is these uses that the study has focused on, although potential future office provision is largely dealt with by the Council’s Employment Land Review in the context of assessing the necessary future needs for employment land.
- 1.10 A list of definitions of terminology used in the report are provided in the Glossary.

Methodology

- 1.11 The study comprises two main elements:
- i) a stock-take of existing evidence including an economic “health check” for the main settlements and villages. This includes the identification of key qualitative and other issues from existing data, policy, strategy and anecdotal evidence; and,
 - ii) an analysis of supply, demand and need (a “quantitative assessment”) for future retail and leisure provision.
- 1.12 This approach to the assessment follows national guidance in Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4)⁵.

⁵ See

<http://www.communities.gov.uk/planningandbuilding/planningsystem/planningpolicy/planningpolicystatements/pps4/>

Consultation and Engagement

1.13 Consultation with local and other representative groups and organisations (stakeholders) is key to ensuring that the study is accurate and represents circumstances “on the ground”. To that end, various parts of this study have been developed with contributions from the following stakeholders, amongst others:

- Parish and Town Councils;
- Chambers of Trade and Commerce;
- Minehead Hotels Association;
- Transition Minehead and Alcombe;
- Minehead Development Trust;
- Minehead Visioning Group;
- Exmoor National Park Authority; and,
- Somerset County Council.

1.14 Consultation, with a wider audience, has been key to the Quantitative Assessment part of the study, with analysis being based primarily on a consumer survey, further details for which are included in Appendix 6 of this report.

2. National Policy Context

2.1 National planning policy guidance is currently undergoing significant review. The previous Government's suite of Planning Policy Guidance Notes (PPGs), Planning Policy Statements (PPSs) and accompanying Good Practice and Supplementary Notes are to be replaced in 2011 / 12 by the Coalition Government's National Planning Policy Framework (NPPF). Until PPGs and PPSs are replaced by the NPPF, it is sensible to follow the guidance in terms of preparing evidence for the spatial planning strategy whilst taking note of the NPPF consultation draft's contents. PPS4 and the relevant parts of the draft NPPF are summarized below.

Planning Policy Statement 4: Planning for Sustainable Growth

2.2 Planning Policy Statement 4: Planning for Sustainable Growth (PPS4) contains policy advice on planning for town (and village) centres, underpinned by a number of key objectives which include:

- building prosperous communities by improving the economic performance of cities, towns, regions, sub-regions and local areas, both urban and rural;
- reducing the gap in economic growth rates between regions, promoting regeneration and tackling deprivation;
- delivering more sustainable patterns of development, reduce the need to travel, especially by car and respond to climate change;
- promoting the vitality and viability of town and other centres as important places for communities; and,
- raising the quality of life and the environment in rural areas by promoting thriving, inclusive and locally distinctive rural communities whilst continuing to protect the open countryside for the benefit of all.

2.3 The guidance takes a centres first approach requiring a sequential test for new main town centre uses, i.e. looking at using sites in the centre first, then edge of centre, then out of centre and then out of town. A supplement which accompanies PPS4 provides guidance on need, impact and the sequential approach¹.

National Planning Policy Framework (consultation draft)

2.4 The NPPF consultation draft² simplifies the length and detail of the PPG / PPS series. There are similarities between it and the direction of travel

¹ See <http://www.communities.gov.uk/publications/planningandbuilding/towncentresguide>

² See <http://www.communities.gov.uk/planningandbuilding/planningsystem/planningpolicy/planningpolicyframework/>

set by the PPS, although it is short on detail. For town centres, the advice focuses on the need to promote their vitality and viability. Amongst other requirements, it requires local planning authorities to: define a network and hierarchy of centres; define the extent of the town centre and primary shopping area; undertake an assessment of retail and leisure needs and allocate suitable sites accordingly; and, set policies for the consideration of retail and leisure proposals which cannot be accommodated in or adjacent to town centres. There have been concerns from some quarters that the draft NPPF does not do enough to protect town centres or foster a “centres first” approach to planning for town centre uses.

Use Classes Order

2.5 The type of use that buildings and premises are used for is categorized in the Use Classes Order³. These categories are shown in Figure 2.1 and have been used in the Healthcheck part of the study to identify type and numbers of shop, facilities and business in the town and village centres.

Figure 2.1: Use Classes

| Use Class | Use | Permitted Change |
|---|--|---|
| A1 Shops | Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes. | No permitted change. |
| A2 Financial and professional services | Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices. | A1 (if there's a ground floor display window) |
| A3 Restaurants and cafés | For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes. | A1 or A2 |
| A4 Drinking establishments | Public houses, wine bars or other drinking establishments (but not night clubs). | A1, A2 or A3 |
| A5 Hot food takeaways | For the sale of hot food for consumption off the premises. | A1, A2 or A3 |
| B1 Business | Offices (other than those that fall within A2), research and development of products and processes, light | B8 (where no more than |

³ The Town and Country Planning (Use Classes) Order 1987 (as amended) puts uses of land and buildings into various categories known as 'Use Classes'. See <http://www.planningportal.gov.uk/permission/commonprojects/changeofuse> for further details.

| Use Class | Use | Permitted Change |
|---|--|--|
| | industry appropriate in a residential area. | 235 square metres) |
| B2 General industrial | Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste). | B1 or B8 (B8 limited to 235 square metres) |
| B8 Storage or distribution | This class includes open air storage. | B1 (where no more than 235 square metres) |
| C1 Hotels | Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels). | No permitted change. |
| C2 Residential institutions | Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres. | No permitted change. |
| C2A Secure Residential Institution | Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks. | No permitted change. |
| C3(a) Dwellings | Use by a single person or a family (a couple whether married or not, a person related to one another with members of the family of one of the couple to be treated as members of the family of the other), an employer and certain domestic employees (such as an au pair, nanny, nurse, governess, servant, chauffeur, gardener, secretary and personal assistant), a carer and the person receiving the care and a foster parent and foster child. | No permitted change. |
| C3(b) Dwellings | Up to six people living together as a single household and receiving care e.g. supported housing schemes such as those for people with learning disabilities or mental health problems. | No permitted change. |
| C3(c) Dwellings | Allows for groups of people (up to six) living together as a single household. This allows for those groupings that do not fall within the C4 HMO definition, but which fell within the previous C3 use class, to be provided for i.e. a small religious community may fall into this section as could a homeowner who is living with a lodger. | No permitted change. |
| C4 Houses in multiple occupation | Small shared dwelling houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom. | C3 |
| D1 Non- | Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or | No permitted change. |

| Use Class | Use | Permitted Change |
|---------------------------------|--|--|
| residential institutions | hire), museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres. | |
| D2 Assembly and leisure | Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used). | No permitted change. |
| Sui Generis | Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: theatres, houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos. | No permitted change / specific planning permission required. |

3. Strategic Policy, Strategies and Guidance

- 3.1 There is much policy guidance and advice which has been produced at the strategic (regional and county) level. What follows is a short summary of some of the key guidance, policies and strategies relevant to the West Somerset LPA. A fuller list of key policies and documents etc. is given in the Bibliography to this report and the Local Development Framework Sustainability Appraisal Scoping / Baseline Report documents relevant documents and strategies relating to town centres in a number of its topic papers¹.

Regional Spatial Strategy

- 3.2 The Coalition Government has announced its intention to revoke Regional Spatial Strategies². The revocation will formally come into effect when the Localism Bill is enacted, which is expected to take place at the end of 2011 / beginning of 2012. Until that time, the policies of RSSs remain material considerations in the consideration of planning applications and drafting of Local Development Framework documents. However, notwithstanding the policy position and future revocation of RSSs, the evidence on which it is based will remain. It is therefore worth noting for contextual reasons, the policies which came about in the draft RSS³ (published in 2006) and the Proposed Changes⁴ (published in 2008) as a result of evidenced research.
- 3.3 The key policies of relevance to town and village centres in the LPA are Development Policies B “Development at Market Towns” and C “Development at Small Towns and Villages” and the policies in section 8 which deal with employment land, tourism, and city and town centres. These policies saw some minor changes in the Proposed Changes but the direction of travel remained constant and follow principles laid down by PPS4 and its predecessor Planning Policy Statement 6: “Planning for Town Centres” (PPS6). As a strategic planning document, none of the

¹ See <http://www.westsomersetonline.gov.uk/Planning---Building/Planning-Policy/Local-Development-Framework/Sustainability-Appraisal>

² In the South West, a final RSS was not published by the then Secretary of State prior to the election in May 2010 and so, in effect, a final RSS will never be approved in the South West following the Coalition Government’s announcement to revoke RSSs. Formally, however, the RSS in the South West is comprised of Regional Planning Guidance Note 10 (RPG10 – see <http://www.dorsetforyou.com/media.jsp?mediaid=131794&filetype=pdf>) (approved in 2001) and County Structure Plan policies which were “saved” when the Planning and Compulsory Purchase Act came into force in 2004. The 2004 Act introduced RSSs which were designed to take the place of Structure Plans. “Saving” policies in the Structure Plans meant that a policy vacuum would be avoided until the final RSS was published.

³ http://www.southwest-ra.gov.uk/nqcontent.cfm?a_id=836

⁴ http://gosw.limehouse.co.uk/portal/regional_strategies/drss?pointId=109242

centres in the West Somerset LPA were named in the RSS given that it dealt principally with large scale development and therefore only named larger towns and cities. The key issue to note is that the development of the RSS took place substantially before the recession.

Regional Economic Strategy

- 3.4 The Regional Economic Strategy was published by the South West Regional Development Agency (RDA) in 2006 and covered the period to 2015. It provided an aspirational and shared vision for the South West's economy. In order to help drive the region's economy, the RES set comparatively high targets for the region in terms of economic growth. The pace of and route to that change has clearly been knocked off its path since the onset of the recession. The Coalition Government has committed to close RDAs by the end of March 2012.

Towards 2015 – Shaping Tomorrow's Tourism

- 3.5 Published in 2005 by South West Tourism, Shaping Tomorrow's Tourism⁵ is the Tourism Strategy for the South West. The Strategy's aims were designed to protect the environment, improve the quality of life of local people and take advantage of the region's existing strengths; and create a long-term and sustainable industry.

Somerset Sustainable Community Strategy "A Landscape for the Future"

- 3.6 Whilst the Somerset Strategic Partnership's formal mechanisms and role was suspended in October 2010 due to changes being gone through by public sector organizations, its priorities for Somerset encapsulated in the Sustainable Community Strategy 2008 – 2016⁶ are worth noting. The Strategy's aims are:
- Making a positive contribution. People of all ages and walks of life should be valued.
 - Living sustainably. Everyone should be aware of the impact of climate change on the county and of the importance of reducing and managing its effects.
 - Ensuring economic wellbeing. Somerset should be a place with high value and secure jobs and people should be confident that their children have good career prospects.

⁵ See <http://www.towards2015.co.uk/pages/vision.asp>

⁶ See <http://www.somersetstrategicpartnership.org.uk/community/>

- Enjoying and achieving. Somerset should be a great place to live and to raise children. Everyone should feel able to develop and improve their skills and life opportunities. free from poverty and discrimination.
- Staying safe. People of all ages should feel safe in their homes and on the streets and roads of Somerset.
- Being healthy. People should be healthy and everyone should have the information and support needed to make the best choices about their lifestyles.

Somerset and Exmoor National Park Joint Structure Plan Review

3.7 The Joint Structure Plan Review covers the period 1991 – 2011 and was adopted in 2000. As referred to above, at the current time, all but one of the Structure Plan policies remain “saved” to avoid a policy vacuum⁷. Chapter 5⁸ deals with the Economy. Policies 16 – 23 (inclusive) deal with employment land, town centres, the rural economy, retail and tourism. In the main, policies follow sustainability and sequential location principles and reflect the direction of travel set by Government policy.

Somerset Local Economic Assessment

3.8 In 2010, Somerset County Council was given a new statutory duty⁹ to undertake a Local Economic Assessment (LEA) for the county. This assessment provides a common economic evidence base for the County and District Councils which can be used for strategy and policy formulation. Whilst the Coalition Government no longer requires LEAs to be undertaken, many Local Authorities remain committed to the process.

3.9 The Somerset Economic Assessment contains analysis of:

- The functional areas across which Somerset's economy operates, e.g. travel to work areas, retail catchment areas and patterns of employment;
- The productivity and structure of Somerset's economy;
- Skills levels, worklessness and average earnings;

⁷ Policy 53: Department Of The Environment, Transport and the Regions Road Schemes, has not been saved. See <http://www.somerset.gov.uk/irj/public/services/directory/service?rid=/wpcccontent/Sites/SCC/Web%20Pages/Services/Services/Environment/Somerset%20and%20Exmoor%20National%20Park%20joint%20structure%20plan> for further details.

⁸ See http://www.somerset.gov.uk/irj/go/km/docs/CouncilDocuments/SCC/Documents/Environment/Strategic%20Planning/Spatial%20Planning/JSPlan/sp_the_economy.pdf

⁹ Duty given by the 2009 Local Democracy, Economic Development and Construction Act. For further information about the LEA, see <http://www.somerset.gov.uk/irj/public/services/directory/service?rid=/wpcccontent/Sites/SCC/Web%20Pages/Services/Services/Community/Somerset%20Economic%20Assessment>

- Transport, ICT and housing infrastructure;
- Business needs; and,
- Future trends.

3.10 A number of topic and research papers underpin the LEA. Of particular relevance to this study are the Rural Economy Topic Paper and the Functional Economic Market Areas analysis. Following consultation, the final LEA for Somerset was published in February 2011.

Somerset Cultural Strategy

3.11 The Cultural Strategy¹⁰ for Somerset is a web-based strategy and supports the wider Community Strategy for the county. Its Vision is:

“Somerset is the heart of Culture in the South West and a centre of excellence in cultural activity.”

3.12 It groups action for the next three years around five main themes:

1. Living sustainably;
2. Community growth;
3. Economic wellbeing;
4. Enjoying and achieving; and,
5. Being healthy.

3.13 In West Somerset, the delivery of the Cultural Strategy actions is aided by ARTlife¹¹.

¹⁰ See http://createsomerset.co.uk/Somerset_Cultural_Strategy/Introduction

¹¹ See <http://www.artlife-somerset.co.uk/index.htm>

4. Local Policies, Strategies and Research

- 4.1 Given the breadth of town centre uses which have been covered by this study, there are a multitude of strategies and research of relevance to the study. This section summarises the main local strategies and research undertaken which will inform the study but does not appraise all which might be relevant.

West Somerset Sustainable Community Strategy

- 4.2 Driven by the West Somerset Strategic Partnership¹, whose aim was to provide strategic direction to help improve the quality of life in West Somerset, the Sustainable Community Strategy 2007 - 2010² describes what the Partnership and the community it represents would like West Somerset to look like in 2020. Whilst the Strategy would have currently been subject to a review, in light of the Strategic Partnership's dissolution and changes in the Coalition Government's policy position and priorities, it seems unlikely that the SCS will be updated any time soon. However, the direction of travel that it sets remains relevant. It has a three part economic, social and environmental Vision seeking:

- a prosperous West Somerset;
- a welcoming, strong and balanced community; and,
- an increasingly self-sufficient West Somerset.

- 4.3 A selection of key things that the Strategy sets out to achieve which relate to town and villages centres includes:

- to make West Somerset a quality location for businesses;
- to increase the income from tourism;
- to increase economic equality and social engagement;
- to develop and maintain a thriving sense of community;
- to improve the health of all people, starting with the most vulnerable people;
- to ensure that all young people can get involved in cultural and leisure activities; and,
- to improve the use and coverage of public and community transport schemes.

¹ See <http://www.wssp.biz/site/index.php>

² See http://www.wssp.biz/site/images/stories/ws_comm_strategy_07-10.pdf

West Somerset Council Corporate Plan 2011/12

4.4 The Corporate Plan for 2011-12³ sets out a Vision:

“To be an improving Council that, together with its partners is working to provide the necessary infrastructure and opportunities for people to continue to live and prosper in West Somerset. To support the vulnerable and to maximise external funding opportunities to the greater benefit of the whole community.”

4.5 Reflecting this Vision, the primary objectives are Financial Standing and Hinkley Point (as priorities) and also Housing, Economic Development and Tourism, Environment and Community Engagement.

West Somerset District Local Plan

4.6 The West Somerset District Local Plan⁴ was adopted in April 2006. As part of the transition to Local Development Frameworks, until the new Core Strategy for the LDF is adopted, the majority of Local Plan policies remain “saved” by the Government. The policies of particular relevance to the town centres assessment include the following.

4.7 Policy SP/1 sets out the settlement hierarchy with Minehead designated as a town; Williton and Watchet as Rural Centres; Brushford, Carhampton, Corwcombe, Dunster Marsh, Kilve, Stogumber, Stogursey and Washford as villages and other smaller settlements regarded as small villages. Chapter 6 is the main section which relates to town and village centres and deals with, amongst other things, the economy, tourism, employment and shopping. Chapter 7 relates to transport and accessibility, while Chapter 8 includes policies for Sports, Recreation and the Arts. Most of the policies relating to town and villages centre uses remain “saved”. Policies relevant to particular settlements and town centre uses are referenced further in Appendices 3 to 5 of this report.

West Somerset Retail and Town Centres Study

4.8 In 2004, the Council commissioned consultants to carry-out a PPS6 compliant study on retail and town centres for the West Somerset LPA area. In summary, the resultant report (published in 2005) concluded that:

- Minehead suffers from a number of commercial weaknesses related to the mix and strength of retail offer, partially because of the shopping

³ See <http://www.westsomersetonline.gov.uk/Council---Democracy/Corporate-Priorities>

⁴ See <http://www.westsomersetonline.gov.uk/Planning---Building/Planning-Policy/Local-Plan>

environment not maximizing its potential and partly because of the nature and quality of retailing units available in the centre. The town needs to continue to develop in order to maintain its position in the retail hierarchy in the sub-region;

- any future relocation of the Council offices from Williton could have implications for retailing trading patterns;
- Watchet should continue to serve the local catchment area utilizing small scale floorspace provision and some tourism related floorspace growth;
- there is considerable leakage of consumer expenditure to shops outside the District;
- Minehead had capacity (at the time of reporting) for approximately 1,700 sq. m. net additional convenience goods floorspace in 2011, increasing to 2,100 sq. m. in 2016, equating to a new modern food store opening before or around 2011;
- Existing market shares for Minehead showed that there is capacity for around 850 sq. m. net additional floorspace for comparison goods by 2006, up to 3,250 sq. m. net additional by 2011 and 6,000 sq. m. by 2016;
- Some “clawback” could be achieved by providing retail offer missing for which residents have to travel outside of the District for, such as hardware and DIY goods;
- There are few opportunities in Minehead to accommodate new growth and any edge or out of centre retail development should encourage linked trips to other shops and services;
- The sequential approach should be applied pro-actively to ensure that the vitality and viability of Minehead’s town centre is retained to 2016; and,
- There is only a need for limited provision at Williton and Watchet for comparison goods.

Employment Land Review

4.9 The Employment Land Review (ELR)⁵ was undertaken in 2009 / 10 to inform the developing LDF Core Strategy. It provides:

- an assessment of existing industrial estates, enterprise parks and other concentrations of primarily non-retail businesses and, land that potentially could be allocated for employment use in the future;
- analysis of past supply and demand, looking at trends and changes in the type and nature of local businesses and employment; and,

⁵ See <http://www.westsomersetonline.gov.uk/Planning---Building/Planning-Policy/Local-Development-Framework/Evidence-Base-Information/Employment-Land-Review>

- a general assessment of development of particular use classes (B.1 – Light industrial, Commercial Office and, Research & Development; B.2 – General Industrial; and, B.8 Storage and Warehousing), including an indicative projection of the amount of future land that may be required in the future to meet anticipated demand.
- 4.10 It is relevant to this study because of the role that “employment” land and premises play in town and village centres and because of the potential development and redevelopment sites identified in the ELR.

Strategic Housing Land Availability Study

- 4.11 The Strategic Housing Land Availability Study⁶ (SHLAA) was published in 2010 and was undertaken to inform the developing LDF Core Strategy. It provides:
- an assessment of over 80 sites that were nominated for consideration as land that potentially could be allocated for residential use in the future;
 - brief analysis of past supply and demand, looking at trends and changes in housing provision;
 - an indicative figure as to what each site could accommodate, were it to be developed, combined with when delivery could start and how long it would take for each site to be built-out; and,
 - identifies any potential constraints that could affect delivery of individual sites.
- 4.12 The SHLAA is relevant to this study because of the potential development and redevelopment sites it identifies and the relationship between those sites as potential housing or mixed development opportunities and future potential development and / or regeneration of town and village centres.

Core Strategy Options Paper

- 4.13 In 2010 a Core Strategy Options Paper⁷ was published for consultation. The consultation asked about the sort of strategy and policies the Core Strategy should include to help make West Somerset a more prosperous and attractive place in which to live and work. The Options Paper, together with the consultation responses and this and other evidence base studies will feed into the developing Core Strategy.

⁶ See <http://www.westsomersetonline.gov.uk/Planning---Building/Planning-Policy/Local-Development-Framework/Evidence-Base-Information/Strategic-Housing-Land-Availability-Assessment>

⁷ See <http://www.westsomersetonline.gov.uk/getattachment/Planning---Building/Planning-Policy/Local-Development-Framework/Current-Consultations/Core-strategy-options-paper-March-2010.pdf.aspx>

4.14 Issues raised in the Options Paper of particular relevance to the town and village centers study include:

- Strengthening and broadening the local economy;
- Providing appropriate facilities, including housing, for the District's ageing population;
- Improved provision of sport and recreation facilities;
- Providing an appropriate level of facilities for young people;
- The need to increase the self containment of West Somerset settlements;
- Promoting tourism and in particular more sustainable tourism;
- Increasing the amount of, and broadening the variety of employment opportunities within the District, particularly the knowledge based, high income sector;
- Protecting the landscape and built heritage of West Somerset;
- Co-ordinating policy development with the Exmoor National Park Authority; and,
- The impact of the Hinkley Point nuclear power station proposals.

Economic Development Strategy Refresh “Responding to Change”

4.15 The refreshed Economic Development Strategy (2011) moves the 2009 Strategy, “Delivering a new equilibrium” forward, responding to the changes in the economy. Importantly, the Strategy recognizes that the delivery of its objectives and actions are the responsibility of not only the Council, which will have a strategic leadership role, but of business and community groups. It identifies the primary challenges as: an ageing population; peripherality; housing; economic volatility; peak oil; managing low carbon transition and economic transformation; and, new models of public service delivery. The Strategy's overarching themes are: Retain skilled workers; Enterprise and entrepreneurship; Improve connectivity; and, Protecting and developing key assets. It seeks to respond to the changing economy and the key challenges that it and the socio-economic make-up of the District presents.

LDF Sustainability Appraisal

4.16 The planning documents which form the Local Development Framework and the policies they contain are required to be tested by social, economic and environmental sustainability questions. The Sustainability Appraisal (SA)⁸ undertakes this assessment for all policies throughout the process of their development. The Scoping / Baseline Report, which is the first stage

⁸ See <http://www.westsomersetonline.gov.uk/Planning---Building/Planning-Policy/Local-Development-Framework/Sustainability-Appraisal> for information about the LDF SA.

in the SA process, produced topic papers on the key issues relevant to the Core Strategy. In addition to this report, it will provide an essential reference point as policies are developed for the Core Strategy. Many of the documents of relevance referred to in this report have also been summarized in the Topic Paper on Labour Market, Economy and Regeneration.

Town, Parish and Neighbourhood Plans and Strategies

4.17 Some Parish and Town Councils in the West Somerset LPA have adopted or agreed Parish or Town Plans. Others have survey information on the community's views on facilities, services and so on or are in the process of developing their Parish Plan. The main plans of relevance to this study (summarized below) are:

- Minehead Community Regeneration Plan;
- Watchet 2025 and the Watchet Urban Design Framework; and,
- Williton Parish Plan.

4.18 The Parishes of Brompton Ralph, Clatworthy and Huish Champflower feature in the "10 Parishes Community Plan 2009 – 2014"⁹ with the 7 other Parishes located within the Taunton Deane Borough Council area. Other Parishes within the West Somerset local planning authority area are in the process of conducting surveys of their community and / or are in the process of drawing together a Parish Plan.

4.19 Key issues raised in these Plans (relevant to this study) have been identified in the settlement health checks Appendices 3 - 5.

Minehead Community Regeneration Plan

4.20 In 2002, the Minehead Community Regeneration Plan was published by the Market and Coastal Towns Initiative Community Planning Group. Six key priority themes were identified:

1. Developing and implementing and overarching economic regeneration strategy
2. Learning and skills development
3. The provision of a wide range of cultural and sporting opportunities and facilities
4. Enabling access to a wide range of services and facilities
5. Supporting community safety initiatives and the provision of high quality Social Care for all
6. The ongoing process of community development and involvement

⁹ See http://www.wiveliscombe.com/10_parishes_community_plan_consultation_2009/

4.21 These cross cutting themes provide a framework in which action projects have been prioritised. The Plan also describes a programme of action to implement the priorities, many of which have been actioned.

Watchet 2025 (the Community Strategic Plan) and Watchet Urban Design Framework

4.22 The Watchet 2025 community plan¹⁰ includes aims and objectives which have taken into account a socio-economic “health check” of the town (as well as the results of consultation and a strategic review of strategies and plans). Themes include, amongst others, climate change, quality of the environment and the local economy. The Plan’s objectives include, amongst others:

- Enhance the local shopping experience;
- Promote existing and new businesses;
- Enhance the visitor experience;
- Promote growth in the local tourism economy by supporting managed strategically co-ordinated tourism initiatives;
- Promote diversification in the local economy by supporting managed, strategically co-ordinated initiatives linked to local food production, processing, distribution and consumption;
- Encourage environmentally sensitive town centre enhancement; and,
- Provide a mix of facilities and activities appropriate to the needs of all ages.

4.23 For each of the themes, an action plan has been developed for delivery of the aims and objectives.

4.24 The Watchet Urban Design Framework, produced in 2003, fed into the Watchet 2025 document and set down a framework for change in the town’s central area, including exploration of the improvements now seen along the Esplanade and the proposed redevelopment at East Wharf. It sought to raise the overall quality of the central area and its objectives were to:

- encourage greater activity around the harbour;
- increase public accessibility to the harbour and maintain access to the water;
- create better pedestrian linkages across the town;
- improve the quality of existing streets and public spaces;
- create a more comfortable environment for pedestrians; and,

¹⁰ See <http://www.watchetonline.co.uk/watchet2025.php>

- encourage the redevelopment of key sites to improve the quality of the built environment and to generate economic benefits – new businesses, new jobs and new homes.

Williton Parish Plan

4.25 The Williton Parish Plan was published in 2006¹¹. In terms of the village centre, issues identified include a lack of retail variety, poor visitor provision within the village centre, a need for enhancement of the built environment, and centralisation of the Council's offices to Killick Way (now completed). Potential solutions suggested included market stalls within the village centre, provision of quality retail units and village centre enhancements, a need to resolve retail issues arising from consultation, and better provision for visitors. The Plan features other issues and possible solutions including, amongst others, a focus on industry, parking and Parish facilities. Issues relating to the village centre are currently the subject of discussions through the draft Williton Masterplan (see below).

Williton Masterplan: Consultation Draft

4.26 The Williton Masterplan was published for consultation in June 2011¹². The draft highlights potential opportunities for the village:

- Delivery of new housing, some of which could potentially be used to accommodate Hinkley;
- Point C Project construction workers;
- A village-wide flood risk management scheme;
- Improvements in traffic, cycle and pedestrian circulation to address congestion in the village centre and improve safety;
- Improved use of available and vacant sites for open space provision including provision of a new public open space which functions at the heart of the village;
- Improvements in the village centre to enhance the existing public realm;
- Further investment in key village centre activities to maintain and enhance the village centre;
- Improve existing employment areas in the village to attract business investment; and
- Maintain and secure the long-term role of the village as local service centre for surrounding rural communities.

4.27 To achieve these it proposes a series of development criteria which could be used to steer future development. In all, seven areas in and around

¹¹ See http://website.lineone.net/~michael_williams/pdf/williton_parish_plan.pdf

¹² See <http://www.westsomersetonline.gov.uk/masterplan>

Williton were explored as options for future change which will inform the developing Core Strategy for the LPA area.

Hinkley Point C Supplementary Planning Document: Consultation Draft

- 4.28 In its National Policy Statement on Energy Infrastructure¹³, the Government has announced a number of preferred sites for development of new nuclear capability. Hinkley Point power station is one of those sites. The planning process for development of two new reactors, "Hinkley Point C" has commenced¹⁴, with planning applications being determined in July 2011 by the Council for preliminary works. The application for the reactor itself will be considered by the Infrastructure Planning Commission (IPC) and EDF is expected to submit a Development Consent Order in the Autumn of 2011.
- 4.29 A number of feasibility and impact studies have been completed which provide an analysis of the implications of the development of the proposed new reactors, principally focusing on West Somerset and Sedgemoor Districts, including analysis of transport, housing and accommodation and other economic impacts.
- 4.30 The key issues of relevance to the area are being considered through the developing Supplementary Planning Document process, the Core Strategies / Local Plans of West Somerset Council and Sedgemoor District Council, various EDF consultations, the planning applications for the associated works, and review of associated key policy documents. The key issues relating to West Somerset Local Planning Authority area are well documented through these processes. Some of these key issues, related to low carbon / renewable energy and wider socio-economic issues / the impact on existing local communities, include:
- the impact on transport infrastructure, on accommodation (temporary and permanent housing) and on the tourism sector;
 - the potential to maximize opportunities from the low carbon energy sector, in terms of jobs and skills development, business supply chains and hi-tech industry;
 - low carbon, nuclear energy, specialist construction and other job opportunities; and,
 - the impact of jobs displacement on the local economy.

¹³ Approved in July 2011. See http://www.decc.gov.uk/en/content/cms/meeting_energy/consents_planning/nps_en_infra/nps_en_infra.aspx

¹⁴ See <http://www.westsomersetonline.gov.uk/hinkleypoint>

- 4.31 Draft policy guidance (the Hinkley Point C Project Supplementary Planning Document or SPD¹⁵) was published for consultation in February 2011 by West Somerset and Sedgemoor District Councils in response to the proposals. It proposes policy advice and guidance on the proposed development sites associated with the main development at Hinkley Point.

Other Local Authority Town Centre and Retail Studies

- 4.32 Both Taunton Deane Borough Council and Sedgemoor District Council have undertaken Town Centre and / or Retail studies, published in 2009¹⁶. Both have been taken into account during the development of the West Somerset LPA area study although neither reference West Somerset District or its main settlements.

¹⁵ See <http://www.westsomersetonline.gov.uk/Planning---Building/Planning/Hinkley-Point/Hinkley-Point-C-Supplementary-Planning-Document>

¹⁶ See <http://www.tauntondeane.gov.uk/irj/go/km/docs/CouncilDocuments/TDBC/Documents/Forward%20Planning/Evidence%20Base/RetailAndLeisure.pdf> for Taunton Deane's latest retail study and <http://www.sedgemoor.gov.uk/index.aspx?articleid=6512> for Sedgemoor District Council's.

5. Local Projects and Initiatives

- 5.1 There are a number of active Groups and organizations in West Somerset (in addition to Parish and Town Councils) which are pursuing projects and initiatives and have an interest in this study.

Minehead Visioning Group

- 5.2 Facilitated by West Somerset Council, the Minehead Visioning Group was formed in 2010 to develop a Vision for the town, identify priorities and explore potential project ideas to help deliver the priorities and realize the Vision, utilizing funding ring fenced for Minehead, which includes Government Seaside Strategy funding as well as applicable planning obligation (section 106) funds.

- 5.3 Its Vision for Minehead is for it in 2020 to be a “thriving, prosperous, safe and attractive town, with access to quality services and facilities for residents, business and visitors alike”.

- 5.4 The following priorities have been identified:

- Developing an overarching economic plan (that compliments and adds value to existing strategy and policy);
- Ensuring that the local population have access to the appropriate skills and training they need to realise potential, gain employment and grow business;
- Further provision and development of a range of cultural and leisure facilities and activity;
- Enabling access to a wide range of services and facilities, both for residents of Minehead and its hinterland and visitors to the area;
- Supporting community safety initiatives; and,
- Continued and cohesive involvement of the key stakeholders in working to realise the vision and harnessing wider community engagement.

- 5.5 The Visioning Group is comprised of representatives of the following organizations:

| | | |
|----------------------------|---------------------------------|------------------------------|
| West Somerset Council | Minehead EYE | Butlins |
| Somerset County Council | Minehead Chamber | Minehead Town Council |
| Regal Theatre | West Somerset Community College | West Somerset Railway |
| Minehead Development Trust | Engage | Somerset Skills and Learning |

Minehead Development Trust

5.6 The Minehead Development Trust¹ was formed in July 2010. The Group is involved in a range of community projects, currently focusing on the future of the old Minehead Hospital (vacated in February 2011) and Clanville Community Garden.

5.7 The vision for the old hospital site is to create:

“A vibrant hub of cultural, community and economic activity, open to and loved by all, that maximises the location and the buildings’ architectural features and setting, and offers a range of exciting opportunities for the people of the town, the area and the visitors it attracts and serves as a major catalyst for the economic, social and cultural revitalisation of Minehead and West Somerset.”

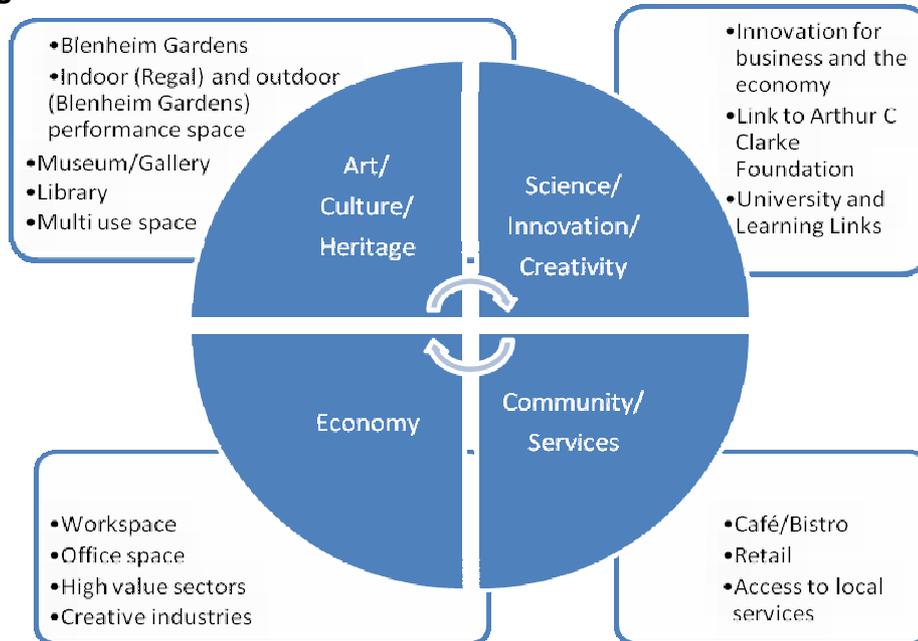
5.8 Physically the site should create connections between three linked areas:

- Blenheim Gardens – that has space for relaxation, a café and a bandstand;
- the ‘old’ Minehead Hospital that will be home to a range of cultural, social and economic activity; and
- The Regal Theatre that accommodates up to c.400 people for the performing arts.

5.9 Intellectually, creativity/innovation/science is central to the Trust’s vision and this will be an intrinsic part of the cultural, community and economic offer. Figure 5.1 illustrates the potential offer of this hub.

¹ Formerly the Minehead Old Hospital Development Trust formed in 2008. Members are drawn from Minehead Chamber of Trade; the Regal Theatre / ARTlife; Minehead Conservation Society; Engage West Somerset; Minehead Hoteliers Association; Transition Minehead and Alcombe; Minehead EYE; Minehead Town Council; West Somerset Council; Somerset County Council; plus Sir Julian Luttrell and a local accountant. See <http://www.mineheadcommunity.co.uk/> for further information.

Figure 5.1



Source: Minehead Development Trust

5.10 The Trust has been exploring options for re-development of the old Minehead Hospital site, which it is seeking to secure for the benefit of the community. Discussions about the future of the site between the Development Trust and the NHS Trust, which owns the site, are continuing.

West Somerset Streetscape Project

5.11 The West Somerset Streetscape Project was run over 2010 / 11. Managed by ARTlife and funded by West Somerset Council, the project provided a grant to fund local artists to create and display installations in empty shop units. The project was steered by a partnership of community organisations. The group also acted as a sounding board to discuss other potential collaborations, for example, the potential development of a cultural quarter in Minehead.

Transition Minehead and Alcombe

5.12 The Transition Minehead and Alcombe Group² is a group of people from Minehead, Alcombe and the surrounding area who support the idea that the community should become more self-reliant by working together to

² See <http://transitionmineheadandalcombe.org/>

help each other reduce consumerism; produce less waste; and, produce more of what we need locally (especially food, heat and electricity).

Success Stories

- 5.13 There are many other towns and villages across the country which have faced similar issues to those of Minehead, Watchet and Williton and have sought routes to improvements and success. Whilst many of these were beneficiaries of funding in better economic times, the principles of what was achieved and how these places have been overcoming problems remain important if change is to be delivered. The main issue for towns and villages seeking change and improvement in the current financial climate is that of not only leveraging in funding to bring about that change, but how to bring about change without significant funding.
- 5.14 Although now no longer running, due to the closure of the South West Regional Development Agency, the Market and Coastal Towns Association had³ provided a useful route in to some of the initiatives in the South West and beyond.
- 5.15 The following examples provide a tour through some of the key issues. Some of the principles common to most of them are:
- Effective partnership, management and leadership of delivery;
 - Community ownership;
 - Create the conditions in which people will want to stay once they are in the centre;
 - Make places a destination in their own right;
 - Understand the strengths and weaknesses in the local economy;
 - Do not try to compete with other, nearby, places which have established economic niches or economic (retail, cultural etc) offer. Compliment instead and develop linkages;
 - Compliment and build upon existing strengths and assets;
 - Treat change as an opportunity rather than a threat;
 - Improve the quality of the offer;
 - Invest in the public realm;
 - Ensure a variety of quality places to eat and drink; and,
 - Make the most of the local environment and historic links.

³ The website of the MCTA is no longer live due to the SWRDA's closure. However, the Dawlish Community Trust produced a useful report documenting some of the success stories and success factors in small town regeneration. See <http://www.dawlishcommunitytrust.org.uk/masterplan/downloads/section7.pdf>

6. Social, Economic & Demographic Characteristics

- 6.1 It is important to have an understanding of the current state of the local economy and a socio-demographic picture of the local area to provide the context for the settlement analyses. Appendix 2 provides a fuller summary of the picture painted below of the current characteristics of West Somerset. Within the District as a whole, generally speaking, the area has the following characteristics.

Tourism and Culture

Strong tourism sector and offer.

Value of tourism to the District economy was estimated to be £138m (2009), with 2,148 full time equivalent jobs (2,994 actual jobs full and part-time) either directly or indirectly related to tourism, representing 18% of all employment in the district.

Successful local cultural events and festivals.

An increasing participation in cultural events alongside a falling public sector subsidy.

Economy

Dependency upon the seasonal tourism economy.

Land based industry.

Opportunity to benefit from the green knowledge and low carbon energy economic sectors.

Poor road links but good ICT opportunities.

Enterprising.

Strong creative industries.

Successful and higher number of smaller businesses.

Retail

Healthy proportion of independent shops in the main settlements.

Demand for retail units.

Few retail vacancies.

Retail has fared well so far through the recession compared to other towns and villages .

Retail rents have remained stable in recent years.

Rising costs of fuel could help retain more spend although inflation and rising inflation counteracts this.

Deprivation

Some pockets of high deprivation.

Rural low wage.

West Somerset ranks amongst the 15% most deprived local authorities, particularly in relation to geographic barriers to housing and services.

District is ranked 45th out of 326 local authorities nationally with other districts in the county ranked less deprived. The next “most deprived” area in somerset is sedgemoor ranked 154th.

West Somerset features three of the top ten most deprived wards in the county, Carhampton & Withycombe, Watchet and Williton.

Functionality and choice

Self-reliant and self-contained.

Looks to Minehead as the main centre.

Looks to Williton and Watchet as rural hubs.

Looks to places such as Taunton and Bridgwater for a wider choice.

Employment

High percentage of people employed in tourism related activity compared to other districts.

Lower rates of unemployed than county average.

Unemployment rates rise and fall with tourist season.

Ageing Population

The population of West Somerset in 2009 was 35,400, a change of +300 from 2001.

Higher proportion of older aged people and ageing population.

Sizeable numbers of neighbourhoods characterised by “financially secure and physically active older people, many retired to semi-rural locations” and “older people preferring to live in familiar surroundings in small market towns”.

Environment

Largely rural in nature with attractive coastline and countryside.

Strong link with Exmoor National Park in landscape (and economic) terms.

A high quality of life.

7. Key Findings

- 7.1 This chapter summarises the key findings from the health checks (Appendices 3 to 5) and the quantitative needs assessment (Appendix 6). It does this on the basis of setting out headlines for the settlements of Minehead, Watchet and Williton and a brief summary for the smaller villages. Headlines relevant to the LPA area or District as a whole are limited mainly to market and catchment-wide issues and implications and are therefore confined to the appendices¹, given the nature of the assessments being focused largely on the settlements as hubs of business and retail activity. However, in addition to these findings, more generally, given the changing nature of planning system and Government guidance and policy, it will be prudent to monitor the proposed changes and their potential impact on town and village centres in the context of the emerging Core Strategy / Local Plan.
- 7.2 Detailed information and analysis of the main three settlements can be found in the Appendices. As explained earlier in this report, the health checks for the settlements of Minehead, Watchet and Williton provide a snapshot of conditions at a point in time. They cover a broad range of issues, some of which are more relevant for some settlements than others, which include:

| The Town / Village | Demographic / Socio-economic Profile |
|---|---|
| Town Centre Uses Summary | Population & socio-economic profile |
| Town Centre Environment | Economy and employment |
| Retail (Rank, Catchments, Areas & uses, Representation, Floorspace, Vacancies, Rates & Rents, Retailer demand / requirements, Footfall) | Tourism |
| Accessibility | Deprivation |
| Potential Development Sites | Crime and Safety |
| | Leisure, Recreation, Arts & Culture |
| | Sport |
| | Local Plan Policy Review |

- 7.3 The summaries which follow have been drawn from analysis of these issues, from dialogue with key stakeholders during the study and from the quantitative needs assessment. They therefore provide a mix of quantitative, qualitative and anecdotal evidence.

¹ Particularly Appendix 1 which provides an analysis of socio-demographic and economic data for the District and Appendix 6 which presents findings from the Quantitative Needs Assessment at the study area level, i.e. West Somerset and Exmoor National Park.

Minehead

- 7.4 The study has drawn-out a number of key facts about the town². As expected, Minehead is the dominant centre in the LPA area. The town ranks (in retail terms, i.e. floorspace, variety of offer, numbers of outlets, etc.) 65th out of 121 towns ranked in the south west. Other towns of a similar size in floorspace terms include Burnham on Sea (74th) and Frome (51st). Larger centres, for example Bridgwater and Taunton, rank 27th and 8th respectively.
- 7.5 There are a total of 453 business and retail premises and other community / public building uses in Minehead and Alcombe, including the town centre and industrial estates, 224 of which are outside of the town centre boundary defined in the Adopted Local Plan and 22 of which are in Alcombe. Of the 207 within the town centre, 69 are within the defined “Prime Shopping Area” (PSA). *(Throughout this report, when referring to the Minehead “town centre”, this means the town centre area defined within the adopted Local Plan. See Appendix 3 for further details.)*
- 7.6 There are 169 shops (A1 use class) across Minehead, 22 “banking and financial service” premises (A2 use class), 62 pubs, cafes, restaurants and take-aways, 36 hotels, B&Bs and residential institutions (use class C1 and C2) and 52 office, industrial and storage units (B use class). Outside of the defined town centre, there is an even share of uses between shops (A1), hotels, B&Bs and residential institutions (C1 and C2), office, industrial and storage units (B uses), pubs, cafes, restaurants and take-aways (A3, A4 and A5) and “sui generis” units (i.e. those in a use class of their own), all occupying around 15% - 17% each of the total occupied stock. The relatively high proportion of pubs, cafes, restaurants and take-aways is probably due to both the contribution made by tourists and by a demographic structure which sees significant expenditure in the wider area on leisure activities. The location of shops and businesses identified in the uses survey have been mapped in Appendix 3.
- 7.7 Figure 7.1 lists types of shop by number.

² figures do not include premises on the Butlins campus, although the full health check does reflect the important presence of Butlins. The survey of the town’s business and retail uses was undertaken in March / April 2011.

Figure 7.1

| Premises Type | Minehead town centre* | Alcombe | Outside town centre* and Alcombe |
|--|-----------------------|---------|----------------------------------|
| Cafes, coffee shops, bakery (inc. pasty / sandwich take away), restaurants | 18 | 2 | 7 |
| Food / general | 5 | 0 | 2 |
| Supermarket / store (inc. small multiples) | 2 | 2 | 2 |
| Clothes and shoes | 17 | 0 | |
| Banks and other financial | 6 | 0 | 2 |
| Estate Agents | 6 | 0 | 1 |
| Toys, gifts, accessories, tourist | 14 | 0 | 2 |
| Newsagents, Post Office, stationery, cards, books, confectionary | 12 | 2 | 0 |
| Electrical (inc. IT / computer shops and mobile phones) | 7 | 1 | 1 |
| Takeaways (inc. "fast food") | 7 | 4 | 6 |
| Pubs, bars and clubs | 1 | 1 | 8 |
| Home (inc. DIY / home improvement and décor / furnishings / building supplies) | 7 | 0 | 12 |
| Charity | 6 | 0 | 0 |
| Variety | 1 | 0 | 0 |
| Discount | 5 | 0 | 2 |
| Specialist / other | 25 | 2 | 13 |
| Health and Beauty | 3 | 0 | 0 |
| Barbers, hair and beauty | 12 | 0 | 4 |
| Pharmacy | 0 | 1 | 1 |
| Opticians | 3 | 0 | 0 |
| Betting | 2 | 0 | 0 |

Source: Town Centre Uses Survey, West Somerset Council, 2011

Notes: Only A use classes included in this count. "Specialist / other" represents those uses which do not neatly fit into another category or have a particular niche market and includes Solicitors, hardware, pet shops, florists, jewelry, framing, galleries, photography, travel agents, sports and cycles, amongst others. Where there is a split of uses, the predominantly use has been counted – for e.g. for Boots, it is counted in the "Health and Beauty" category rather than "Pharmacy". Butlins premises not included in count. * "Town Centre" is defined by the Adopted Local Plan Town Centre boundary – see Figure A3.59.

7.8 At the time of survey there were 12 vacant units in the defined town centre (4 of which are in the PSA) and 14 outside of the centre, a good rate considering how the economy is nationally. However, anecdotally, this number has increased slightly since the survey was undertaken.

7.9 "Zone A" (largely PSA or central shopping area) rents in Minehead are around £33 - £35 per square foot with rents outside of this area around £30 - £33 per square foot. This has changed little in recent years.

- 7.10 Across Minehead, 42% of all premises have a gross area floorspace of up to 80 square metres / 861 square feet, 53% have a floorspace of 80 – 600 square metres / 861 - 6,458 square feet with the remaining 5% being over 600 square metres / 6,458 square feet. The total amount of floorspace in Minehead and Alcombe is around 32,000 square metres (344,445 square feet) (gross).
- 7.11 With regard to convenience (food) retail, there is no leakage in terms of spend from areas immediately around Minehead to other larger settlements. Convenience turnover (per annum) from residents' spending in the West Somerset LPA and Exmoor National Park areas is: £21.2m at Tesco, £11.8m at Morrisons, £3.9m at Co-op, £1.2m at Iceland, £2.1m at Alcombe stores and £3.1m in the remaining town centre area. Turnover from tourists has been estimated at around £8.5m. The total turnover therefore equals around £51.8m, compared to an average from similar sized stores elsewhere of £59.2m.
- 7.12 The primary catchment area for comparison (non-food) retail extends to Porlock and beyond to the west and almost as far as Watchet and Williton to the east and south east. Beyond this, the secondary catchment area from which there will be trade leakage to other larger settlements extends across much of Exmoor and the half-way mark between Minehead, and Taunton and Bridgwater. In all, despite not being able to compete with larger centres in secondary catchment areas, this is a significant catchment area, demonstrating the draw of Minehead's comparison goods floorspace and offer in the local area, equivalent to £26.7m from the study area.
- 7.13 Comparison spend in Minehead for types of goods is as follows: clothes and footwear, £2.8m; furniture, floor coverings and textiles, £3.2m; DIY and hardware, £2.8m; domestic appliances, £1.5m; smaller electric appliances, £4.9m; personal and luxury goods, £6.7m; and recreational goods, £4.6m.
- 7.14 Minehead's offer overall is broadly similar to the national average, although it has elevated levels of comparison shops and lower vacancy rates, reflecting its use by residents and tourists.
- 7.15 The research has identified that Minehead's key strengths include:
- an economy which shows signs of performing well against the recession compared to other towns;
 - a wide rural catchment for its services and retail offer;
 - good levels of self-containment, aided by its current journey times by road to competing centres;
 - a high proportion of independent retailers and businesses in the centre;
 - a relatively low shop vacancy rate in the town centre;
 - additional convenience choice following the development of a second supermarket on the edge of town;

- a good variety of local tourist attractions;
- returning visitors;
- an attractive surrounding natural environment (beach, Quantocks, Brendon Hills and Exmoor);
- well attended and popular events including the West Somerset Railway Galas and Blenheim Gardens Music Festival; and,
- the contribution that Butlins makes to the economy as a whole through tourist numbers and support given to events.

7.16 Alongside these strengths, there are a number of issues and opportunities that have become apparent during this study which are worth considering as the preferred Core Strategy / Local Plan and any other subsequent statutory or non-statutory strategies and action plans for change are developed (by the Local Planning Authority, wider Local Authority or other local organizations and groups). These are grouped into those identified by the health check (Appendix 3) and those identified by the Quantitative Needs Assessment (Appendix 6).

7.17 **The issues identified are not listed in order of priority or any preference and their inclusion does not mean that they are a priority for the Council. Organisations, bodies or groups that could be responsible for taking action in response to the issues have not been identified. Whilst the health check highlights significant opportunities for enhancing Minehead in terms of its retail and business offer and its infrastructure and environment, what remains critical is finding practical and cost effective ways of delivering action to respond to these issues. This will be particularly challenging against the backdrop of a weakened economy. Responding to some of the issues listed in a way that delivers outputs and outcomes may not be feasible, given the resources available to those organizations, bodies or groups which may wish to act on the issues. In addition, the key point which should not be lost when considering the issues identified below is how planning policy and a planning strategy can, if at all, respond to them.**

Health Check

7.18 Town Centre and Retail

- i) Maximise community, business and retail opportunities which could arise through the regeneration / redevelopment of the **old hospital site**. Improve links through the site to Blenheim Gardens to make the Gardens more integral to the town centre, and to better link cultural and tourist activity. Also improve links from these areas to the Regal Theatre.
- ii) Through **environmental improvements**, increase the attractiveness of the high street (with a particular emphasis on empty shops), improve signage both within the town and on the business parks and ensure a vibrant and colourful sea front. Improved accessibility and signage could draw more tourists into the town centre from Butlins, the edge of centre shops and the seafront.
- iii) There is a **shortage of suitable medium and small sized retail units** in the town centre for businesses to grow or relocate into. This might, in part, explain why there is a relatively high level of retailers present on the industrial estates, although cost of premises and a preference for edge of town locations will also be drivers. This pattern of change in recent years is, however, not uncommon across the country.
- iv) There are some concerns about the potential continued **impact of the Morisson's supermarket** on trade in the town centre, particularly on independent retailers.
- v) Identify, support and implement additional or alternative ways to help ensure **delivery of concepts and visions**.
- vi) There are some negative perceptions towards the **farmers' / continental markets** from some retailers, but also some very positive comments from others (and some residents) about the economic benefits it brings.
- vii) There are **perceived gaps** in some types of **retail provision and choice**.

7.19 Tourism

- i) A need to be able to **adapt to changes in market demand** over time to prevent decline. This could change for a number of reasons including rising fuel prices, changes to the length of stays, less travelling abroad for holidays, or an increase in day trips as a proportion of total number of visits.
- ii) Monitor the **impact of the proposed Hinkley Point C** development on tourism in the town if it proceeds.
- iii) Explore **how best to market Minehead**. Whilst it sits well within the Exmoor brand, as a destination in its own right and base for exploring the area, it can get "forgotten".
- iv) Explore opportunities for the development of **niche tourist themes** to improve the attractiveness of Minehead as a destination in its own

right. Develop a USP (unique selling point). Niche and themed events hosted by Butlins already bring a different type of visitor to Minehead and this type of activity could be built upon beyond Butlins and better linkages made between such themed events and the wider cultural and tourist offer in and around Minehead.

- v) There is a need to more fully **understand the impact of tourism**, given its importance to the Minehead economy, and improve knowledge of accommodation sector in the town through improved monitoring.
- vi) Continue to explore the **feasibility of other development / redevelopment opportunities**, for example, a major “wet weather” tourist attraction and re-constructing a pier on the seafront, even if in the long-term.
- vii) A perceived issue of balance with regard to the **impact of Butlins** on the town centre. On one hand, there are concerns about the negative impact of stag and hen groups (adult weekends) on the town centre in terms of anti-social behaviour, but on the other, recognition that they bring economic benefits to the town, particularly out of season.

7.20 ***Economy and Employment***

- i) Take the opportunity to **harness intellect and prosperity** of the significant proportion **of the population which is recently retired**. Together with opportunities, the demographic make-up of the town will continue to present challenges to the area and its services.
- ii) **Explore examples of other successful towns** with a similar economy, function and size to establish how they have increased success and prosperity – for example, building on the Transition Towns approach (relating to the example of towns such as Totnes), or regeneration / reinvention of seaside resorts such as Newquay or comparator seaside towns.
- iii) As noted above, there is significant dependency on the tourist trade during the summer months and is therefore a need for **greater diversity in the local economy**. Playing to the local economy’s strengths are important, but ensuring diversity including niche areas of business is of equal significance.
- iv) **Capitalise on low carbon and renewable energy opportunities** to:
 - meet Building Regulation carbon dioxide (CO₂) emissions reduction standards (see the Low Carbon and Renewable Energy Study) on potential development and redevelopment sites in and around the town;
 - maximise opportunities to utilise complimentary energy users and uses;
 - link to opportunities arising from the proposed Hinkley Point C development, if it proceeds; and,
 - deliver super-fast broadband, to grow the “green and low carbon economy sectors” in the area.

7.21 ***Accessibility and Connectivity***

- i) As identified above, **improve linkages within the town.**
- ii) A perceived lack of available (free or lower cost) **car parking** close to shops in the centre and a need to improve controls and enforcement of illegal on-street parking.
- iii) **Monitor accessibility** to Minehead (and other settlements with services not available in rural areas) from rural areas away from main road corridors in particular. Combine this with monitoring of availability of services and shops in villages.
- iv) Lobby and establish the business case for **alternative modes of access** to Minehead to enable tourist visits as travel costs increase and if congestion arising from the Hinkley Point C proposed development, if it proceeds, occurs. This could include further work on the establishment of a ferry service (and deep water jetty) and improved rail connections out of the District.

7.22 ***Leisure, Recreation, Arts and Culture Uses***

- i) Continuation of the successful use of **Blenheim Gardens** for festivals and events.
- ii) As identified above, **improve linkages** to Blenheim Gardens and through to the Regal Theatre.
- iii) As identified above, **improve links between events** hosted by different organisers.
- iv) Respond to the **cultural opportunities** presented by Minehead's **socio-demographic** make-up.
- v) Exploring opportunities of increasing community links with and use of facilities in Butlins.
- vi) Develop / enhance the **Regal Theatre** to fulfil its potential.
- vii) Explore opportunities to improve the **access** point for non-Butlins residents to the **cinema**.
- viii) Further consideration of the potential enhancement to facilities at the **Minehead Football Club**.

7.23 ***Future Policy and Monitoring Considerations***

- i) Consider, utilising the evidence contained within this report and through further work on the Core Strategy / Local Plan, Neighbourhood Plan or other initiative:
 - revision of the defined **“town centre” boundary** including inclusion of the old hospital site;
 - revision of the **“Prime Shopping Area” boundary**;
 - identification of **key links** between the town centre and other “hot spots” of focused retail activity and pedestrian movement (for

- example the seafront and edge of centre / out of town supermarkets) and Blenheim Gardens through to the town centre;
- designation of the shops in **Alcombe** as a neighbourhood shopping area;
 - whether the **seafront** area requires a designation should particular types of development or use be required to be retained or encouraged; and, identify other policies to help **protect and enhance** Minehead's retail and service offer in light of this study and changes to the planning system and guidance.
- ii) **Monitor the composition of uses** in the town based on the uses survey undertaken for this study.

Quantitative Needs Assessment

7.24 The following key issues have been drawn from the Quantitative Needs Assessment's conclusions.

7.25 Comparison

- i) There is an 'in principle' potential to increase the town's market share because of leakage of expenditure to other, larger, settlements. However, the small amount of expenditure surplus and small size of centres **unlikely to attract new comparison retailers**.
- ii) In reality there is therefore a need in Minehead for a **focus on modest scale improvements and defending the existing retail function** of the town in face of larger competing centres.

7.26 Convenience

- i) The recent opening of **Morrisons has absorbed any surplus capacity** in the West Somerset and Exmoor National Park study area which would have existed prior to its opening.
- ii) Due to the difference between the turnover generated in the study area and the average turnover generated by similar sized stores elsewhere, there is no quantitative shortfall in floorspace. This means that **there is no need for additional convenience floorspace in Minehead** until after 2026.
- iii) The impact of the continued growth of **internet shopping** deliveries, with convenience retailers expanding delivery services into rural areas, should be monitored given its potential impact on local convenience shopping.

7.27 Traders' Survey

7.28 Key issues raised through the traders' survey included:

- i) **car parking**, particularly charges;
- ii) that the **centre attracts mainly older people to shop** with younger people traveling elsewhere where there is a greater choice;
- iii) that a majority of trade comes from local residents but that up to around **40% of trade might come from tourists**; and,

- iv) concerns that the Friday market causes **disruption to movement** around the town centre.

7.29 **Hinkley Point**

- i) The proposals for the new reactor at Hinkley Point have the potential to have significant impacts on the local economy. There is, at present, little information which can provide an accurate forecast of the impact on retail in quantitative terms. It is possible that the construction phase of the build will have a positive impact on retail spending in the eastern part of West Somerset LPA area. Due to the proximity of Bridgwater, however, it is unclear whether the impact will be long-lasting or lead to a need for additional new retail floorspace to be developed. It will therefore be important to **monitor the impact of the Hinkley Point development** on retail provision, if it proceeds, including legacies of what is likely only to be a temporary (even if for several years during the construction phase) increase or boost to the local retail economy.

7.30 **Future Policy and Monitoring Considerations**

- i) A need to consider emerging policies in the Core Strategy / Local Plan in light of the **changes being introduced to the planning system** by the Government in the National Planning Policy Framework and Localism Bill.

Conclusions

- 7.31 In summary, Minehead is performing well considering the impact on town centre uses elsewhere in the country. However, this position should not be taken for granted and regular monitoring of the situation will be important in order to react in a timely way with appropriate action. Monitoring is also important given the potential impact that the proposed development at the Hinkley Point C power station, if it proceeds, could have on the area, although there are questions about the degree to which there will be any significant impact on the town's retail offer and performance. The growing sector of internet convenience shopping and deliveries should also be taken into account in monitoring. Given these issues, it is important that any future planning strategy for the town which seeks to address the spatial implications of change in retail and business terms has synergy with the recently refreshed West Somerset Economic Development Strategy.
- 7.32 There is little, if any, need for expansion in floorspace terms in the convenience or comparison elements of retail. The new Morrison's supermarket on the edge of the town has absorbed any expenditure capacity in convenience shopping and at the present time there is no need for substantial additional new floorspace in the town until after 2026. Although there is some potential (in principle) to claw back some of the leakage in comparison expenditure lost to other towns such as Taunton and Bridgwater, it is unlikely that this would translate to a

requirement for a new store, rather, enhancement of the existing provision and offer.

- 7.33 With few opportunities for improving the quality or supply chain of the stock of premises through major refurbishment, the few opportunities which do exist presented by vacant stores in the centre and potential redevelopment of the old hospital site (for one or more of community, commercial, retail and / or housing uses) should be maximised, if viable in the current economic climate. Other improvements to the town's environment and cultural offer will also play an important role if they can be delivered. This position, one of maintaining and enhancing the town's retail (and other services) offer and its attractiveness to visitors in the short and medium term should be the focus for the town in the next 10-15 years.
- 7.34 As the emerging Core Strategy is moved forward to take into account proposed changes to the planning system, issues of detail which might not have been dealt with in a Core Strategy under the Local Development Framework system (for example, town centre related designations) will need to be considered in terms of the appropriate planning document in which to define them (if considered necessary to the vitality and viability of the centre), be that a new style Local Plan, Neighbourhood Plan or other action / delivery plan.

Watchet

- 7.35 The study has drawn-out a number of key facts about the town. Watchet has a total of 97 business and retail premises and other community / public building uses, 69 of which are in its “central area”³. From its total stock, at the time of the uses survey (March / April 2011), 15 were vacant, many of which are long-term vacancies. The location of shops and businesses identified in the uses survey have been mapped in Appendix 4.
- 7.36 Around 30% of all premises are classed as shops (A1 use class), with cafes, pubs, restaurants and take-aways comprising the next highest percentage at 16%. This reflects the significance of the tourism sector to the town. Office, industrial and storage uses (B use classes) and hotels and B&Bs (C1) form the next two highest proportions at 12% and 11% respectively. Figure 7.3 shows the split of different types of use.

Figure 7.2

| Premises Type | Number |
|--|--------|
| Cafes, coffee shops, bakery (inc. pasty / sandwich take away), restaurants | 7 |
| Supermarket / store (small) | 3 |
| Clothes and shoes | 1 |
| Banks and other financial | 2 |
| Estate Agents | 1 |
| Toys, gifts, accessories, tourist | 7 |
| Newsagents, Post Office, stationery, cards, books, confectionary | 2 |
| Takeaways (inc. “fast food”) | 4 |
| Pubs, bars and clubs | 6 |
| Home (inc. DIY / home improvement and décor / furnishings / building supplies) | 3 |
| Charity | 2 |
| Pharmacy | 1 |
| Opticians | 1 |
| Barbers, hair and beauty | 2 |
| Specialist / other | 5 |

Source: Town Centre Uses Survey, West Somerset Council, 2011

Notes: Only A use classes included in this count. “Specialist / other” represents those uses which do not neatly fit into another category or have a particular niche

³ The “central area” broadly comprises Swain Street, West Street, Anchor Street, Harbour Road and the Esplanade. It is not a planning policy designation but has been derived simply for ease of analysis.

market. The main use of the premises is used in the count unless specified otherwise.

- 7.37 For use class A, B and related sui generis premises there is a total floorspace of 341,485 square feet (gross) (31,725 square metres). Figure 7.4 shows the breakdown of this floorspace by type of use.

Figure 7.3: Floorspace in Watchet

| Use Class | Floorspace | |
|----------------------|------------|--------|
| | sq. ft. | sq. m. |
| A1 | 29,429 | 2,734 |
| of which comparison | 14,068 | 1,307 |
| of which convenience | 5,081 | 472 |
| A2 | 2,745 | 255 |
| A3 | 6,738 | 626 |
| A4 | 14,983 | 1,392 |
| A5 | 3,498 | 325 |
| B | 176,571 | 16,404 |
| Vacant A and B Use | 107,521 | 9,989 |

Source: Town Centre Uses Survey, West Somerset Council, 2011

Note: floorspace figures are based on footprints of buildings measured from GIS.

They represent an approximate gross floorspace area, rather than net or sales area, and do not take into account floorspace which retailers might utilize above the ground floor where shops comprise more than one floor level.

- 7.38 Of the premises in the town, 20 are small (up to 80 square metres / 861 square feet gross) and 15 are medium sized (80 – 600 square metres / 6,458 square feet gross). There are no large premises (over 600 square metres).
- 7.39 Retail rents in the centre of Watchet along Swain Street are around £14 per square foot falling to around £11 per square foot in the other streets and have changed very little in recent years.
- 7.40 In terms of convenience food shopping, around 73% of trips from the area (Watchet, Washford, Luxborough and Treborough) for main food shopping go to stores in Minehead. A further 6% go to Watchet and 4% to Williton. The remained (around 16%) flow to areas outside of the West Somerset LPA and Exmoor study area, leaking to other large settlements including Taunton and Bridgwater. For top-up shopping trips, 45% are retained in Watchet, 18% go to Minehead and 17% to Williton.
- 7.41 Convenience stores in the town attract around £1.9m of spend from the study area, all of which comes from its immediate area, with no

additional expenditure attracted from residents further afield who, as the figures above suggest, are more likely to go to Minehead or other large settlements for main food shopping.

- 7.42 The best performing store is estimated to be the Co-op in Liddymore Road (£0.9m). The Co-op on Swain Street sees around £0.6m expenditure, with the Spar at £0.1m and other convenience stores £0.3m. With estimated tourist expenditure of £0.4m, the total spend on convenience shopping is around £2.3m.
- 7.43 Average performance levels of companies' similar sized stores equates to £2.2m and so this suggests that there is no obvious existing quantitative need and no obvious overtrading.
- 7.44 With regard to comparison shopping, most goes out of Watchet to either Minehead or other larger settlements, with Watchet attracting less than £1m of expenditure on comparison goods per annum from the study area.
- 7.45 The research has identified that Watchet's key strengths include:
- a local economy buoyed by the seasonal tourist contribution;
 - the presence of the West Somerset Railway;
 - well supported events including the music festival and carnival;
 - opportunities and potential presented by the East Wharf redevelopment, its heritage offer and links to cultural and environmental assets; and,
 - a well-developed understanding of the challenges facing the town including an evidenced Vision and Action Plan.
- 7.46 Alongside these strengths, there are a number of issues and opportunities that have become apparent during this study which are worth considering as the preferred Core Strategy / Local Plan and any other subsequent statutory or non-statutory strategies and action plans for change are developed (by the Local Planning Authority, wider Local Authority or other local organizations and groups). These are grouped into those identified by the health check (Appendix 4) and those identified by the Quantitative Needs Assessment (Appendix 6).
- 7.47 **The issues identified are not listed in order of priority or any preference and their inclusion does not mean that they are a priority for the Council. Organisations, bodies or groups that could be responsible for taking action in response to the issues have not been identified. Whilst the health check highlights significant opportunities for enhancing Watchet in terms of its retail and business offer and its infrastructure and environment, what remains critical is finding practical and cost effective ways of delivering action to respond to these issues. This will be particularly challenging against the backdrop of a weakened economy. Responding to some of the issues listed in a way that delivers outputs and outcomes may not be feasible, given the**

resources available to those organizations, bodies or groups which may wish to act on the issues. In addition, the key point which should not be lost when considering the issues identified below is how planning policy and a planning strategy can, if at all, respond to them.

Health Check

7.49 Town Centre and Retail

- i) The levels of **deprivation** combined with the impact of the continuing recession on disposable incomes and therefore spend, inflation and the seasonality attached to retail is likely to be having an impact on the town centre's offer in retail terms. However, much of the centre comprises of shops which serve the tourism sector in addition to or instead of predominantly local trade. Buoyancy of the tourism season, therefore, is likely to be critical to Watchet's current levels of deprivation not deteriorating further.
- ii) Build on opportunities presented by the **East Wharf** development, if it proceeds.
- ii) Enhance the **local shopping experience** through environmental improvements to pedestrian access, signage and lighting and encouraging local residents to use local shops and services and buy local produce. Discussion has raised the need to improve first impressions of the town centre environment and generally "smarten up" its appearance and overall quality.
- iii) It has been suggested that whilst local businesses are vocal in their support for improving Watchet's offer and the centre's environment, that there remains a need for some to **act on enthusiastic support to help deliver** improvements and change when opportunities arise.
- iv) Comparison (non-food) retail in the town appears to be **reasonably dependant on tourist spend**.
- v) **Promote diversification in the local economy** by supporting managed, strategically co-ordinated initiatives linked to local food production, processing, distribution and consumption by... (measures including) support for local producers, processors, distributors and food retailers.
- vi) Identify, support and implement additional or alternative ways to help ensure **delivery of concepts and visions**.

7.50 Tourism

- i) The town should take the opportunity to **develop niche tourism and cultural offer(s)** given that it has to compete with more attractive tourist attractions and destinations, is off the beaten track and is not a destination in its own right. For example, opportunities exist to develop Watchet's tourism offer in line with a low carbon, green economy and eco focus.

- ii) **Enhance the visitor experience** by improving quality standards within the tourism and service sectors and by working with traders to enhance the shopping experience, encourage longer seasonal opening hours, events and markets.
- iii) **Promote growth in the local tourism economy** by supporting managed, strategically co-ordinated tourism initiatives.
- iv) There is a need to be able to **adapt to changes in market demand** over time to prevent decline, given the dominance of Minehead and Exmoor National Park.

7.51 ***Economy and Employment***

- i) **Explore examples of other successful towns** with a similar economy, function and size to establish how they have increased success and prosperity – for example, building on the Transition Towns approach (relating to the example of towns such as Totnes), or regeneration / reinvention of seaside resorts such as Newquay or comparator seaside towns.
- ii) There is a need to **diversify the local economy** to reduce relative reliance on the tourism sector. Hi-tech and “cottage industry” sectors, links with supply chains in relation to the green and low carbon economies and opportunities arising from the Hinkley Power Station proposal, if it proceeds, have all been raised through discussion.
- iii) The South Road Industrial Estate vacant units need to be brought into use. At the same time there appears to be a **shortage of good quality versatile small employment / business units** in the town.
- iv) **Capitalise on low carbon and renewable energy opportunities** to:
 - meet Building Regulation carbon dioxide (CO₂) emissions reduction standards (see the Low Carbon and Renewable Energy Study) on potential development and redevelopment sites in and around the town;
 - maximise opportunities to utilise complimentary energy users and uses;
 - link to opportunities arising from the proposed Hinkley Point C development, if it proceeds; and,
 - deliver super-fast broadband, to grow the “green and low carbon economy sectors” in the area.
- v) There is a **perceived skills shortage** in the town and wider local area to be addressed.
- vi) Creating an **attractive cultural environment** could help to attract people who work in the creative industries.

7.52 ***Leisure, Recreation, Arts and Culture Uses***

- i) Whilst the music festival and other events in particular “pull in” visitors, it is perceived that the overall offer of the centre provides **insufficient quality to encourage people to come back to the town for a repeat**

visit outside of the festival period. In addition there is a perception that there are only small levels of spending by visitors in the town outside of convenience (food) shopping during events.

- ii) Anecdotally, **marketing for events** could be improved to encourage more people to attend.
- iii) There are opportunities to respond to the **cultural opportunities** presented by Watchet's socio-demographic make-up. However, whilst much has been done to identify the potential cultural opportunities for Watchet (in terms of events and infrastructure, ways need to be found to deliver some of these in a financially challenging environment. The need for a Community Cultural Development Strategy has been identified, but if pursued it will need to be capable of being delivered.
- iv) **Maximise social, health, leisure and educational benefits** to the community through improved existing facilities, creating additional high quality and affordable facilities and promoting existing opportunities (including development of a detailed picture of emerging needs through further audit and mapping).

7.53 **Accessibility and Connectivity**

- i) **Monitor accessibility** to Minehead and Watchet from rural areas away from main road corridors in particular. Continue to update understanding, effectiveness and impact of **public and community transport services** on accessibility to key public services and facilities, particularly those which are absent from Watchet where people rely on travel to other settlements, for e.g. Minehead. This should be combined this with monitoring of availability of services and shops in villages.
- ii) Maintain dialogue with the County Council and NHS Somerset to **maintain and seek improvements to the accessibility to public services.**
- iii) The **cost of parking** is an issue for some locals. The cancellation of the 20 minutes of free parking has been unpopular and the introduction of 70p for an hour from 9am (instead of 10am) is seen as a measure which can dissuade people from making short trips into the centre.
- iv) **Support actions to reduce the number of car journeys**, including raising awareness of car sharing and car clubs, improving cycling facilities, promoting public transport and encouraging alternatives.

7.54 **Future Policy and Monitoring Considerations**

- i) Consider the designation (in the appropriate planning document) of a **town centre boundary and retail frontages** in the central area to help retain retail presence, and maintain and enhance the vitality and viability of the centre, preventing change of use to residential or other uses unless evidence clearly indicates otherwise;
- ii) **Consider other designations as necessary** where it can be clearly demonstrated that their designation is required to help deliver actions

- identified through the existing Community Strategic Plan, Design Framework or the development plan or Neighbourhood Plan process;
- iii) identify other policies to help **protect and enhance** Watchet's retail and service offer in light of this study and changes to the planning system and guidance; and,
 - iv) **Monitor the composition of uses** in the town based on the uses survey undertaken for this study.

Quantitative Needs Assessment

7.55 The following key issues have been drawn from the Quantitative Needs Assessment's conclusions.

7.56 ***Comparison***

- i) There is an 'in principle' potential to increase market share because of leakage in the Minehead primary and secondary catchment areas. However, the small amount of expenditure surplus and the small size of centres is **unlikely to attract new comparison retailers**.
- ii) In reality there is a need in Watchet for a **focus on only modest scale improvements and defending the existing retail function** of the existing centre in face of larger competing centres.

7.57 ***Convenience***

- i) Watchet **retains** only a small proportion of main food and around half of all top-up shopping trips within the local area.
- ii) The recent opening of **Morrisons has absorbed any surplus capacity** in the West Somerset and Exmoor National Park study area which would have existed prior to its opening.
- iii) Due to the difference between the turnover generated in the study area and the average turnover generated by similar sized stores elsewhere, **there is no quantitative shortfall in floorspace**.
- iv) Given these reasons and the proximity to Minehead, any increase in the Watchet's market share is likely to be limited and **the scope for improvement therefore lies in relation to top-up food shopping**.
- v) The impact of the continued growth of **internet shopping** deliveries, with convenience retailers expanding delivery services into rural areas, should be monitored given its potential impact on local convenience shopping.

7.58 ***Traders' Survey***

7.59 Key issues raised through the traders' survey included:

- i) the importance of tourism to trade, with some businesses suggesting that around **50% of trade comes from visitors**;
- ii) summer months are the **busiest period**;

- iii) the significance of the **contribution made by the West Somerset Railway**;
- iv) the **dominance** of pubs, hotels, B&Bs and food and drink outlets and **under-representation** of niche food providers such as butchers and greengrocers;
- v) a need for **new non-food retailers**; and,
- vi) negative issues such as **car parking** (charging regime) and **poor signage**.

7.60 ***Hinkley Point***

- i) The proposals for the new reactor at Hinkley Point have the potential to have significant impacts on the local economy. There is, at present, little information which can provide an accurate forecast of the impact on retail in quantitative terms. It is possible that the construction phase of the build will have a positive impact on retail spending in the eastern part of West Somerset LPA area. Due to the proximity of Bridgwater, however, it is unclear whether the impact will be long-lasting or lead to a need for additional new retail floorspace to be developed. It will be important to **monitor the impact of the Hinkley Point development** on the town centre and retail provision, if it proceeds, including legacies of what is likely only to be a temporary increase or boost (albeit over several years) to the local retail economy.

7.61 ***Future Policy and Monitoring Considerations***

- i) A need to consider future policies in the Core Strategy / Local Plan in light of the **emerging changes to the planning system** by the Government in the National Planning Policy Framework and Localism Bill.

Conclusions

7.62 Watchet is fortunate to already have a well-developed vision and action plan for change in the centre and across the community. The key challenge for the town in the coming years will be to be able to translate these ambitions into reality, given the current economic climate.

7.63 The opportunity presented by the East Wharf redevelopment, assuming that it proceeds, can help to provide a catalyst for change as the town seeks to address levels of deprivation and a town centre economy that is reasonably dependent upon the tourism trade. Opportunities to deliver “easy wins” in the short term focusing on minor improvements to the quality of the offer in the centre should be taken. In terms of convenience and comparison shopping in the town, the key focus should be to maintain and enhance current provision and improve its top-up shopping offer given its position in the local economy and retail hierarchy, and the type of spend that the town attracts. Ambitions for local changes to reflect the growing renewable

and low carbon energy agendas will also be important to the town centre and local economy overall.

- 7.64 As changes to the planning system take hold and the planning strategy for the Local Planning Authority area emerges, decisions will need to be taken as to the appropriate planning document within which any designations to protect and enhance the town's retail and service offer sit, be that a Core Strategy / Local Plan, Neighbourhood Plan or other action / delivery plan. It will be important to ensure that any future planning strategy for the town which seeks to address the spatial implications of change in retail and business terms have synergy with the recently reviewed West Somerset Economic Development Strategy.
- 7.65 As with the position with future change in Minehead, the impact of the changing economy, convenience internet shopping and of the proposed Hinkley Point C development (if it proceeds) will be important to monitor closely, to minimise any negative impacts and maximise positive legacies of change.

Williton

7.66 The study has drawn-out a number of key facts about the village. Williton has 128 business and retail premises and other community / public building uses, 26 of which are in the “central area”⁴. At the time of the survey (March / April 2011) there were no vacant premises in the central area but 14 across the rest of Williton, representing around 11% of the total stock. Three of these were “long-term” vacancies in Long Street. The location of shops and businesses identified in the uses survey have been mapped in Appendix 5.

7.67 Office, industrial and storage (B use classes) form the greatest percentage of total premises (31%), with shops (A1 use) the next at 21%. The amount of B uses present reflects Williton’s role as a local centre for employment.

7.68 Figure 7.4 shows the composition of shop types in the village.

Figure 7.4

| Premises Type | Number |
|--|--------|
| Cafes, coffee shops, bakery (inc. pasty / sandwich take away), restaurants | 4* |
| Supermarket / store (small) | 2 |
| Food / general | 2 |
| Banks and other financial | 2 |
| Estate Agents | 1 |
| Newsagents, Post Office, stationery, cards, books, confectionary | 3** |
| Takeaways (inc. “fast food”) | 1 |
| Pubs, bars and clubs | 5 |
| Home (inc. DIY / home improvement and décor / furnishings / building supplies) | 4 |
| Charity | 1 |
| Pharmacy | 1 |
| Opticians | 0 |
| Barbers, hair and beauty | 4 |
| Specialist / other | 10 |

Source: Town Centre Uses Survey, West Somerset Council, 2011

Notes: Only A use classes included in this count unless otherwise specified. The main use of the premises is used in the count unless specified otherwise. “Specialist / other” represents those uses which do not neatly fit into another category or have a particular niche market. * includes the café in Spar and deli counter in Somerset Farmhouse. ** includes the petrol filling station “shop”.

⁴ The “central area” is not a planning designation but for the purposes of the uses survey comprises Fore Street, Long Street (as far as the Western Free Press), Killick Way (as far as the extent of the car park) and Bank Street.

7.69 Of the premises in the central area, 12 are small (up to 80 square metres / 861 square feet gross), 12 are medium sized (80 – 600 square metres / 6,458 square feet gross) and 2 are large (over 600 square metres). The total floorspace in Williton for A, B and related sui generis premises is around 35,356 square metres (gross) (380,639 square feet). Figure 7.5 illustrates the composition of this floorspace between use classes (A, B and SG).

Figure 7.5

| Use Class | Floorspace | |
|----------------------|------------|--------|
| | sq. ft. | sq. m. |
| A1 | 48,965 | 4,549 |
| of which comparison | 23,885 | 2,219 |
| of which convenience | 19,246 | 1,788 |
| A2 | 7,707 | 716 |
| A3 | 1,615 | 150 |
| A4 | 17,007 | 1,580 |
| A5 | 1,851 | 172 |
| Retail SG | 7,481 | 695 |
| B | 171,975 | 15,977 |
| Vacant A and B Use | 123,968 | 11,517 |

Source: Town Centre Uses Survey, West Somerset Council, 2011

Note: floorspace figures are based on footprints of buildings measured from GIS.

They represent an approximate gross floorspace area, rather than net or sales area, and do not take into account floorspace which retailers might utilize above the ground floor where shops comprise more than one floor level.

7.70 Rents in the centre of Williton (Fore Street) have recently been as high as £15 per square foot and are as low as £7 per square foot in Long Street, for example, and have changed little in recent years.

7.71 In terms of main food (convenience) shopping, 27% of trips remain in Williton, with 49% flowing to Minehead and 23% going to other settlements such as Taunton and Bridgwater. 82% of top-up shopping trips are retained in Williton with 8% going to Minehead and 3% going further afield outside of the study area. The comparatively large size of the Co-op and Spar stores help to ensure these relatively high levels and main food and top-up shopping.

7.72 Williton attracts £5.5m of convenience shopping spend from residents in the study area, principally from the immediate surrounding area, but also attracting some small amounts of spend from further afield possibly due to its accessibility (road links and position on the road

network) and the presence of the Council offices. Overall, Williton has a relatively strong convenience shopping offer.

7.73 The stores with the highest turnover are estimated to be Co-op (£3.5m) and Spar (£0.8m), with remaining convenience stores generating around £1.1m. Adding in an estimated £0.7m from tourist spend gives a total of £6.2m.

7.74 Average company trading levels for stores and provision of the size found in Williton equals £6.0m, suggesting that existing quantitative demand in the village is meeting broadly supply.

7.75 With regard to comparison goods, Williton attracts around £1.5m from the study area, more than other smaller settlements which tend to attract less than £1.0m. There is significant leakage of expenditure on comparison goods to larger settlements outside of the study area such as Taunton and Bridgwater.

7.76 The research has identified that Williton's key strengths include:

- a good range of services and shops in the village centre for a settlement of its size and role;
- a good level of employment for a settlement of its size, albeit predominantly at the edge of town;
- a low vacancy rate for premises in the centre of the village;
- a series of opportunities presented by the draft Masterplan;
- being a cross-road for main transport routes through the area; and,
- a reasonably balanced local economy, not being as dependent upon tourism as an employer as other settlements.

7.77 Alongside these strengths, there are a number of issues and opportunities that have become apparent during this study which are worth considering as the preferred Core Strategy / Local Plan and any other subsequent statutory or non-statutory strategies and action plans for change are developed (by the Local Planning Authority, wider Local Authority or other local organizations and groups). These are grouped into those identified by the health check (Appendix 5) and those identified by the Quantitative Needs Assessment (Appendix 6).

7.78 **The issues identified are not listed in order of priority or any preference and their inclusion does not mean that they are a priority for the Council. Organisations, bodies or groups that could be responsible for taking action in response to the issues have not been identified. Whilst the health check highlights significant opportunities for enhancing Williton in terms of its retail and business offer and its infrastructure and environment, what remains critical is finding practical and cost effective ways of delivering action to respond to these issues. This will be particularly challenging against the backdrop of a weakened economy. Responding to some of the issues listed in a way that delivers outputs and outcomes may not be feasible, given the**

resources available to those organizations, bodies or groups which may wish to act on the issues. In addition, the key point which should not be lost when considering the issues identified below is how planning policy and a planning strategy can, if at all, respond to them.

Health Check

7.79 Village Centre and Retail

- i) Improvements in traffic, cycle and pedestrian **access and circulation** to address congestion in the village centre and improve accessibility and safety, and in doing so improve the public realm / urban environment of the centre.
- ii) Improved use of available and vacant sites for **open space provision** including provision of a new public open space which functions at the heart of the village.
- iii) A key challenge in the future will be to **maintain the current balanced representation** which meets village needs whilst enhancing the vitality and viability of the village centre. At the same time, further investment in key village centre activities will be required to maintain and enhance the village centre.
- iv) It has been suggested that there is a **need for more comparison (non- food) goods shops** to provide further diversity of uses and provide people with a choice rather than travel to other nearby towns.
- v) Concern has been raised, through discussions, about the **impact of the proposed food store and associated retail and office units** on current local traders.
- vi) The long-term role of the village as **local service centre** for surrounding rural communities should be secured.
- vii) Identify, support and implement additional or alternative ways to help ensure **delivery of concepts and visions**.

7.80 Tourism

- i) It has been suggested that the tourist **accommodation** in the village should be enhanced overall and that Williton's offer should be better identified.
- ii) Concerns have been raised about the future of the **Bakelite Museum** (due to the need for improved fire access).
- iii) There is a need to improve links between the village centre and the **West Somerset Railway station** to draw in more tourist patronage.
- iv) Improve **marketing** of the village as a place to stay and be based for breaks in the Minehead, Exmoor and Quantocks areas.
- v) There is a need to be able to **adapt to changes in market demand** over time to prevent decline, given the dominance of Minehead and Exmoor National Park.

7.81 ***Economy and Employment***

- i) **Improve and diversify the economy**, playing to strengths as well as making more of other local economies (e.g. tourism) to help tackle deprivation and numbers of those without work.
- ii) There is a **perceived lack of small scale employment units** in the town.
- iii) **Improve existing employment areas** in the village to attract business investment.
- iv) **Capitalise on low carbon and renewable energy opportunities** to:
 - meet Building Regulation carbon dioxide (CO₂) emissions reduction standards (see the Low Carbon and Renewable Energy Study) on potential development and redevelopment sites in and around the town;
 - maximise opportunities to utilise complimentary energy users and uses;
 - link to opportunities arising from the proposed Hinkley Point C development, if it proceeds; and,
 - deliver super-fast broadband, to grow the “green and low carbon economy sectors” in the area.

7.82 ***Leisure, Recreation, Arts and Culture Uses***

- i) Discussion has suggested that more could be made of **existing assets** including existing halls and the recreation ground.
- ii) It has been suggested that the offer of facilities and activities for the **youth and young people** in the village could be improved.

7.83 ***Accessibility and Connectivity***

- i) The use of the free **car parking** before 10 am is welcomed and utilized by many residents. A policy of free parking for 30 minutes in the Killick Way car park would help to retain the vitality of the centre. A need for more disabled parking spaces has been raised.
- ii) **Monitor accessibility** to Minehead and Williton from rural areas away from main road corridors in particular. Continue to update understanding, effectiveness and impact of **public and community transport services** on accessibility to key public services and facilities, particularly those which are absent from Williton where people rely on travel to other settlements, for e.g. Minehead. This should be combined this with monitoring of availability of services and shops in villages.
- iii) Maintain dialogue with the County Council and NHS Somerset to **maintain and seek improvements to the accessibility to public services**.

7.84 **Future Policy and Monitoring Considerations**

- i) Build on the work done through the **Masterplan consultation document and Parish Plan**, taking the health check and Quantitative Needs Assessment into consideration, to identify measures and policies which can be implemented through the Core Strategy / Local Plan, a Masterplan or Neighbourhood Plan to enhance the village;
- ii) Consider the designation (in the appropriate planning document) of a **town centre boundary and retail frontages** in the central area to help retain retail presence, and maintain and enhance the vitality and viability of the centre, preventing change of use to residential or other uses unless evidence clearly indicates otherwise;
- iii) identify other policies to help **protect and enhance** Williton's retail and service offer in light of this study and changes to the planning system and guidance; and,
- iv) **Monitor the composition of uses** in the town based on the uses survey undertaken for this study.

Quantitative Needs Assessment

7.85 The following key issues have been drawn from the Quantitative Needs Assessment's conclusions.

7.86 **Comparison**

- i) There is an 'in principle' potential to increase market share because of leakage in the Minehead primary and secondary catchment areas. However, the small amount of expenditure surplus and the small size of centres is **unlikely to attract new comparison retailers**.
- ii) In reality there is therefore a need in Williton for a **focus on modest scale improvements and defending the existing retail function** of the existing centre in face of larger competing centres.

7.87 **Convenience**

- i) For Williton's market share to increase beyond current levels of main food and top-up shopping trips, it would need to attract more main or bulk food shopping trips. However, there is **insufficient expenditure capacity in the local area to support such a store and the commercial demand from grocery operators is questionable**.
- ii) The recent opening of **Morrisons has absorbed any surplus capacity** in the West Somerset and Exmoor National Park study area which would have existed prior to its opening.
- iii) Due to the difference between the turnover generated in the study area and the average turnover generated by similar sized stores elsewhere, **there is no quantitative shortfall in floorspace**.
- iv) The resulting outcome is that the **focus for Williton should be to maintain its current position rather than trying to grow**.

- v) The impact of the continued growth of **internet shopping** deliveries, with convenience retailers expanding delivery services into rural areas, should be monitored given its potential impact on local convenience shopping.

7.88 **Traders' Survey**

7.89 Key issues raised through the traders' survey included:

- i. concerns that the proposed **new supermarket** could damage existing shops in the centre, but conversely others felt that the proposed store would be good for the village;
- ii. lack of sufficient **car parking** (in the very centre of the village), with the proposed new supermarket being able to address this, as well as attract more people to the centre. Additionally some felt that whilst there are enough parking spaces in Williton, that the cost might dissuade visitors to the centre;
- iii. the **holiday season** sees an increase in the number of visitors but also to increased traffic levels; and,
- iv. disagreement between responses that the village serves the needs of local residents well enough, although an indication that there needs to be additional **leisure and community facilities** alongside any new retail provision.

7.90 **Hinkley Point**

- i) The proposals for the new reactor at Hinkley Point have the potential to have significant impacts on the local economy. There is, at present, little information which can provide an accurate forecast of the impact on retail in quantitative terms. It is possible that the construction phase of the build will have a positive impact on retail spending in the eastern part of West Somerset LPA area. Due to the proximity of Bridgwater, however, it is unclear whether the impact will be long-lasting or lead to a need for additional new retail floorspace to be developed. It will be important to **monitor the impact of the Hinkley Point development** on the town centre and retail provision, if it proceeds, including legacies of what is likely only to be a temporary increase or boost (albeit over several years) to the local retail economy.

7.91 **Future Policy and Monitoring Considerations**

- i) A need to consider future policies in the Core Strategy / Local Plan in light of the **emerging changes being introduced to the planning system** by the Government in the National Planning Policy Framework and Localism Bill.

Conclusion

- 7.92 Williton plays an important role in the local economy as a significant local centre for employment and has a good range of shops and services in its centre. It has had the benefit of having been the subject of a draft Masterplan and this process should be built upon to help

achieve an understanding of key issues which could be resolved through spatial planning processes in the future. As a convergence point for main roads through West Somerset, it benefits from good access to its hinterland but suffers from traffic issues as a result.

- 7.93 The focus for change in the centre should be around environmental improvements of the type suggested in the draft Masterplan and enhancement to the existing retail and service provision, rather than major new additions to the centre's retail floorspace, given the insufficient expenditure capacity within the local area to accommodate such growth.
- 7.94 As changes to the planning system take hold and the planning strategy for the Local Planning Authority area emerges, decisions will need to be taken as to the appropriate planning document within which any designations to protect and enhance the village's retail and service offer sit, be that a Core Strategy / Local Plan, Masterplan, Neighbourhood Plan or other action / delivery plan. It will be important to ensure that any future planning strategy for the village which seeks to address the spatial implications of change in retail and business terms have synergy with the recently reviewed West Somerset Economic Development Strategy.
- 7.95 As with the position with future change in Minehead, the impact of the changing economy, convenience internet shopping and of the proposed Hinkley Point C development (if it proceeds) will be important to monitor closely, to minimise any negative impacts and maximise positive legacies of change.

Villages

Health Check

- 7.96 The analysis of villages has been limited to the types of facilities they have in terms of built community facilities and convenience shops where residents can access basic food shopping needs such as milk and bread. Whilst activities are important to a village community and to the culture and history of the community itself (with many villages with an active Parish Council or other community group running popular events such as village festivals, fetes and fayres), they are usually not as critical to the health of the local economy as activities and events held in the larger settlements. An analysis of the wider offer within villages has not therefore been done as part of this study and villages and Parish Councils will already have an understanding of other activities' importance.
- 7.97 It is difficult to get significant data about the economic health of villages⁵ due to their size and limited functional role outside of acting as very local centres for convenience shopping. However, the following villages were surveyed in the Council's Town and Village Centres Survey in March and April 2011, the results of which are reproduced below as part of the commentary.

| | | |
|------------------------|-------------------------|------------------|
| Battleton ⁶ | Doniford | Skilgate |
| Bicknoller | Dunster Marsh | Stogumber |
| Bilbrook | East Quantoxhead | Stogursey |
| Blue Anchor | Holford | Stolford |
| Brompton Ralph | Huish Champflower | Stringston |
| Brushford | Kilton | Upton |
| Burton | Kilve | Vellow |
| Carhampton | Monksilver ⁷ | Washford |
| Clatworthy | Old Cleeve | West Quantoxhead |
| Crowcombe | Sampford Brett | Willett |
| Crowcombe Heathfield | Shurton | Withycombe |

- 7.98 This list follows that in the Core Strategy Options Paper. Villages outside of the LPA boundary but within Exmoor National Park were not surveyed by the Council but work has been done, by Exmoor National Park Authority, to assess their facilities.

⁵ Not including Williton, which has its own assessment, given its role and relatively large size.

⁶ Village only surveyed in the area within the West Somerset Local Planning Authority area, south of the main road.

⁷ part of which is within the Exmoor National Park boundary, to the north east of the main road.

7.99 Acknowledging the limited data which can be obtained, nonetheless, given the important role that village amenities play in the community, where villages have a shop, general store or post office, managers of those businesses were approached through the Quantitative Needs Assessment to gain their views of shopping in the locality (see Appendix 6). If significant issues of concern are raised through these discussions, about village shops and community facilities at risk, these should be followed up.

7.100 In terms of shops (selling convenience goods) and community facilities (for example, village and church halls, churches⁸ and pubs / inns), each village can be split into one of four categories:

- 1) those with no shops and no community facilities;
- 2) those with no shop but with some community facilities;
- 3) those with a single shop and some community facilities; and,
- 4) those with more than one shop and community facilities.

1) *Villages with no shops and no community facilities*

- Battleton⁹;
- Bilbrook;
- Burton;
- Crowcombe Heathfield (no convenience shop as such, but there is the railway station shop);
- Doniford;
- Dunster Marsh;
- Shurton (the only “community facility”, the Shurton Inn, was not in use at the time of the survey);
- Stolford;
- Vellow; and,
- Willett.

2) *Villages with no shop but with some community facilities (e.g. village hall)*

- Clatworthy;
- East Quantoxhead (although there is a tourist / walkers’ “tea room”);
- Holford;
- Huish Champflower;
- Kilton;
- Monksilver;

⁸ In those villages with only a church present, it has been assumed that there is some limited capacity to host community clubs or groups.

⁹ Village only surveyed in the area within the West Somerset Local Planning Authority area, south of the main road.

- Old Cleeve;
 - Sampford Brett;
 - Skilgate;
 - Stringston;
 - Upton; and,
 - Withycombe.
- 3) *Villages with a single shop and some community facilities (e.g. village hall)*
- Bicknoller;
 - Blue Anchor (no “village” shop but a Costcutter shop on the Hobourne Blue Anchor holiday park site).
 - Brompton Ralph;
 - Brushford;
 - Carhampton;
 - Crowcombe;
 - Kilve;
 - Stogumber;
 - West Quantoxhead (no “village” shop but convenience goods sold at the garage); and,
 - Washford¹⁰.
- 4) *Villages with more than one shop and community facilities*
- Stogursey.

Quantitative Assessment

7.101 Whilst the quantitative assessment has focused principally on the main settlements in the Local Planning Authority area, due to the rural nature of the area, the analysis of data also sought to draw out key issues in relation to the wider rural area and the villages. Information pertaining to the health and offer of villages is summarised from the Quantitative Assessment report (Appendix 6) below.

7.102 Convenience

- i) The smaller villages attract much **smaller levels of expenditure** than the larger settlements, as expected. Stogursey is the best performing of the smaller settlements, attracting around £0.7m of convenience goods expenditure from the study area (West Somerset Local Planning Authority area and Exmoor National Park), which is a reflection of its size and relative isolation (and therefore catchment). Brushford and Stogumber attract £0.2m of convenience goods expenditure each, with Kilve and Bicknoller and both attracting £0.04m each.

¹⁰ Washford Mill has not been included as a convenience shop given its focus on the sale of local produce and gifts. Neither has the station shop been included as a convenience shop.

- ii) **Turnover levels** appear to be good although there are no indications, from the available data, of over-trading taking place. Removing the Minehead, Watchet and Williton data from the total global turnover level for the study area of £69.5m, leaves a total turnover of £9.1m for those other settlements in West Somerset and Exmoor with a convenience floorspace. Comparing this turnover with the amount of existing convenience goods floorspace in the remaining centres for which floorspace data is available¹¹, the sales density equates to around £4,900 per square metre. The report notes that this is reasonable level of trading performance for such rural facilities, although it is not at such a level to suggest that overtrading is occurring. It should also be remembered that it is a 'global' figure for centres outside of Minehead, Watchet and Williton and there may be differences between individual centres which cannot be picked up, for example, due to the generic nature of tourism expenditure data.
- iii) In terms of **expenditure leakage**, all villages will experience some given their role within the settlement hierarchy. Higher percentages of leakage will reflect things such as the offer within villages, peripherality / isolation and distance to other centres which offer a greater range of services and goods. The postcode which incorporates Stogursey (TA5 1) sees 97% of main food and 77% of top-up food shopping leak outside of the West Somerset / Exmoor area, due to the proximity of Bridgwater. For the top-up shopping trips that remain in the local area, 20% flow to Stogursey. This situation is unlikely to change, particularly in relation to main food shopping. However, the one area which could be improved upon is top-up shopping, with the opportunity to increase the current 20% market share for Stogursey, particularly if the new nuclear reactor development proceeds at Hinkley Point.
- iv) In the TA23 0 postcode area (which includes Washford), in relation to main food shopping, 73% of trips flow from the area to stores in Minehead, with 6% remaining in Watchet and 4% flowing to Williton. These **retention levels** for main food shopping are below the average retention rate for main food shopping in the smaller villages across the study area. 16% of main food shopping trips leak outside of the study area. There is a better retention of top-up food shopping trips (45% of trips remain in Watchet, 18% flow to Minehead and 17% flow to Williton), although the retention rate is also below the local average for trip retention.
- v) In the TA4 2/3 postcode area (which includes Brompton Ralph), due to proximity of Taunton, over 90% of main and top-up food shopping trips flow outside of the area. Williton and Minehead attract a small number of trips. This current pattern of leakage to Taunton seems unlikely to change in the future.

¹¹ Brushford, Crowcombe, Stogumber, Stogursey, Washford, Dulverton, Dunster, Lynton/Lynmouth and Porlock.

7.103 **Comparison**

- i) Outside of Minehead, Watchet and Williton, as expected, the smaller villages in the study area attract much smaller amounts of comparison goods expenditure from the study area with most of the villages seeing much less than £1.0m of comparison goods expenditure each.

Conclusion

7.104 In summary, as is to be expected, the focus for the villages must be about maintaining and protecting what is there, principally the offer of small scale convenience top-up shopping. The quantitative assessment suggests that smaller shops are doing well given the size of the settlements and the available market within their catchments. There are likely to be opportunities for Stogursey to increase its turnover (of top-up shopping) if the proposed Hinkley Point C development proceeds.

7.105 Social enterprise is an important dimension to the future protection of local shops. For example, the village stores in Crowcombe, initially aided by grants to ensure it became well-established, is run by volunteers and is a thriving business, generating profits which are distributed to local businesses. This is a model followed by other communities nationwide (for shops and other local services) and can work where desire is followed through with commitment and a robust business case.