JOINT TOWN CENTRE RETAIL STUDY UPDATE 2010
WEST DORSET, WEYMOUTH AND PORTLAND

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TABLE 1
CATCHMENT AREA POPULATION FORECASTS

Zone	Area	2007	2012	2017	2022	2026
Zone 1	Bridport, Lyme Regis	28,213	29,322	31,171	32,387	33,397
Zone 2	Beaminster	9,286	9,704	10,149	10,606	10,988
Zone 3	Central West Dorset	13,110	14,016	15,390	16,452	17,360
Zone 4	North Weymouth	31,269	32,132	33,147	34,075	34,838
Zone 5	Dorchester	17,594	18,646	19,968	21,166	22,182
Zone 6	Weymouth	43,006	44,290	46,531	47,927	49,077
Zone 7	Sherborne	32,268	33,055	34,128	34,947	35,618
Zone 8	Portland	6,221	6,378	6,682	6,849	6,986
TOTAL		180,967	187,543	197,166	204,409	210,446

NOTES:
(1) Catchment Area is based on CBRE NSLSP (2007) as per 2008 Assessment
(2) Population estimates 2007-2017 derived from MapInfo 2010, based upon 2001 Census
(3) Population growth post 2017 to 2026 assumed by CB Richard Ellis based on previous trend

TABLE 1A
POPULATION GROWTH RATES

GROWTH RATES			
2007-2012 (%)	2007-2012 (%)	2007-2022 (%)	2007-2026 (%)
3.9	10.5	14.8	18.4
4.5	9.3	14.2	18.3
6.9	17.4	25.5	32.4
2.8	6.0	9.0	11.4
6.0	13.5	20.3	26.1
3.0	8.2	11.4	14.1
2.4	5.8	8.3	10.4
2.5	7.4	10.1	12.3
3.6	9.0	13.0	16.3

SOURCE: Table 1

TABLE 2

CATCHMENT AREA RETAIL EXPENDITURE FORECASTS (2007 prices)

PER CAPITA EXPENDITURE IN	2007 (£)				
Convenience Goods	1,590	Including SFT		1,558	Excluding SFT
Comparison Goods	2,657	Including SFT		2,503	Excluding SFT

PER CAPITA EXPENDITURE IN	2007	2012	2017	2022	2026
Convenience Goods: (£)	1,558	1,578	1,623	1,703	1,786
Comparison Goods (£):	2,503	2,790	3,137	3,835	4,643

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)
Zone 1 - Bridport, Lyme Regis	44.0	46.3	50.6	55.1	59.6	70.6	81.8	97.8	124.2	155.1
Zone 2 - Beaminster	14.5	15.3	16.5	18.1	19.6	23.2	27.1	31.8	40.7	51.0
Zone 3 - Central West Dorset	20.4	22.1	25.0	28.0	31.0	32.8	39.1	48.3	63.1	80.6
Zone 4 - North Weymouth	48.7	50.7	53.8	58.0	62.2	78.3	89.6	104.0	130.7	161.8
Zone 5 - Dorchester	27.4	29.4	32.4	36.0	39.6	44.0	52.0	62.6	81.2	103.0
Zone 6 - Weymouth	67.0	69.9	75.5	81.6	87.6	107.6	123.6	146.0	183.8	227.9
Zone 7 - Sherborne	50.3	52.2	55.4	59.5	63.6	80.8	92.2	107.1	134.0	165.4
Zone 8 - Portland	9.7	10.1	10.8	11.7	12.5	15.6	17.8	21.0	26.3	32.4
TOTALS	282.0	296.0	320.0	348.0	375.8	452.9	523.2	618.6	783.9	977.2

NOTES:

(1) MapInfo Retail Expenditure Guide 2009/2010

(2) Convenience and Comparison Goods Expenditure Estimates for Weymouth and West Dorset taken form MapInfo Area Profile Report for combined study area

(3) Table 1 for population.

(4) Special Forms of Trading removed for convenience goods at 2% and comparison at 5.8% (2007). Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.1, P18, (September 2009)

(5) Convenience growth from 2007 to 2008 is the estimated actual national average growth. Growth projections 2009 to 2019 apply the Pitney Bowes/Oxford Retail Expenditure Guide forecasts. Thereafter, resumption of 1998 to 2008 trend based growth of 1.2% pa assumed.

Convenience expenditure grown at:

- 2007-2008 at -0.7% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.2, P20, September 2009)
- 2008-2014 at 0.5% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 3.3, P22, September 2009)
- 2014-2019 at 0.6% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 3.3, P22, September 2009)
- 2019-2026 at 1.2% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 2.2, P9, September 2009)

(6) Comparison growth from 2007 to 2008 is the estimated actual national average growth. Growth projections 2009 to 2019 apply the Pitney Bowes/Oxford Retail Expenditure Guide forecasts. Thereafter, resumption of 1978 to 2008 trend based growth of 4.9% pa assumed.

Comparison expenditure grown at:

- 2007-2008 at 4.6% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 3.3, P22, September 2009)
- 2008-2014 at 1.6% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 3.3, P22, September 2009)
- 2014-2019 at 2.9% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 3.3, P22, September 2009)
- 2019-2026 at 4.9% (Pitney Bowes Retail Expenditure Guide 2009/2010;Table 2.2, P9, September 2009)

Table 2A

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS CATEGORIES 2007 (2007 Prices)

Per Capita Expenditure:	Comparison Goods Categories								
	Clothing & footwear	Furniture/ floorcoverings etc	Household Textiles	Domestic Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	TOTAL
Expenditure in 2007 including SFT	£ 583	£ 240	£ 83	£ 88	£ 356	£ 331	£ 336	£ 640	£ 2,657
Exclusion for SFT (%)	5.8	5.8	5.8	5.8	5.8	5.8	5.8	5.8	
Expenditure in 2007 excluding SFT	£ 549	£ 226	£ 78	£ 83	£ 335	£ 312	£ 317	£ 603	£ 2,503
	Total Comparison Goods Expenditure by Goods Category								
	Clothing & footwear	Furniture/ floorcoverings etc	Household Textiles	Domestic Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medical & beauty goods	All other comparison gds	TOTAL
Per capita expenditure 2007:	£ 549	£ 226	£ 78	£ 83	£ 335	£ 312	£ 317	£ 603	£ 2,503
Catchment Zones:	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
Zone 1 Bridport, Lyme Regis	15.5	6.4	2.2	2.3	9.5	8.8	8.9	17.0	70.6
Zone 2 Beaminster	5.1	2.1	0.7	0.8	3.1	2.9	2.9	5.6	23.2
Zone 3 Central West Dorset	7.2	3.0	1.0	1.1	4.4	4.1	4.1	7.9	32.8
Zone 4 North Weymouth	17.2	7.1	2.4	2.6	10.5	9.7	9.9	18.9	78.3
Zone 5 Dorchester	9.7	4.0	1.4	1.5	5.9	5.5	5.6	10.6	44.0
Zone 6 Weymouth	23.6	9.7	3.4	3.6	14.4	13.4	13.6	25.9	107.6
Zone 7 Sherborne	17.7	7.3	2.5	2.7	10.8	10.1	10.2	19.5	80.8
Zone 8 Portland Weymouth	3.4	1.4	0.5	0.5	2.1	1.9	2.0	3.8	15.6
TOTAL	99.4	40.9	14.1	15.0	60.7	56.4	57.3	109.1	452.9

SOURCE:

(1) MapInfo data for Weymouth and West Dorset

(2) Pitney Bowes Retail Expenditure Guide 2009/2010 (September 2009)

(3) Table 1 for population; Table Table 2 for expenditure per head estimates

(4) Special Forms of Trading removed for convenience goods at 2% and comparison at 5.8% (2007), Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.1, P18, (September 2009)

WEYMOUTH TOWN CENTRE FORECASTS

TABLE 3A
WEYMOUTH TOWN CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 1 - Baseline
Market Shares indicated by Household Interview Survey 2007 remain unchanged throughout forecasting period.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO WEYMOUTH TOWN CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2026 (%)	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2026 (%)
Zone 1 Bridport, Lyme Regis	1%	1%	1%	1%	1%	6%	6%	6%	6%	6%
Zone 2 Beaminster	0%	0%	0%	0%	0%	2%	2%	2%	2%	2%
Zone 3 Central West Dorset	0%	0%	0%	0%	0%	9%	9%	9%	9%	9%
Zone 4 North Weymouth	4%	4%	4%	4%	4%	41%	41%	41%	41%	41%
Zone 5 Dorchester	1%	1%	1%	1%	1%	5%	5%	5%	5%	5%
Zone 6 Weymouth	10%	10%	10%	10%	10%	62%	62%	62%	62%	62%
Zone 7 Sherborne	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Zone 8 Portland Weymouth	6%	6%	6%	6%	6%	62%	62%	62%	62%	62%

SOURCE: Table 3a(i) and Household Interview Survey (2007).

TABLE 3A(i)
CONVENIENCE GOODS 2007

ALLOCATIONS TO TOWN CENTRE 2007	Main Food Q2	Top-up convenience Q4	WEIGHTED AVERAGE
Expenditure Weighting:	80	20	100
Zone	(%)	(%)	(%)
Zone 1 Bridport, Lyme Regis	0.6%	0.0%	1%
Zone 2 Beaminster	0.0%	0.0%	0%
Zone 3 Central West Dorset	0.0%	0.0%	0%
Zone 4 North Weymouth	2.3%	10.2%	4%
Zone 5 Dorchester	1.1%	0.0%	1%
Zone 6 Weymouth	5.5%	27.6%	10%
Zone 7 Sherborne	0.0%	2.2%	0%
Zone 8 Portland Weymouth	7.2%	3.2%	6%

SOURCE: Household Interview Survey (2007).

TABLE 4A

FORECAST RETAIL SALES IN WEYMOUTH TOWN CENTRE (2007 prices)

SCENARIO:	As Table 3a									
Catchment zone	RETAIL SALES IN WEYMOUTH TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)
Zone 1 Bridport, Lyme Regis	0.2	0.2	0.3	0.3	0.3	4.6	5.3	6.3	8.1	10.1
Zone 2 Beaminster	0.0	0.0	0.0	0.0	0.0	0.5	0.6	0.7	0.9	1.1
Zone 3 Central West Dorset	0.0	0.0	0.0	0.0	0.0	3.0	3.5	4.4	5.7	7.3
Zone 4 North Weymouth	1.9	2.0	2.1	2.2	2.4	32.0	36.7	42.5	53.5	66.2
Zone 5 Dorchester	0.2	0.3	0.3	0.3	0.3	2.3	2.7	3.2	4.2	5.3
Zone 6 Weymouth	6.7	7.0	7.5	8.1	8.7	66.4	76.3	90.1	113.4	140.7
Zone 7 Sherborne	0.2	0.2	0.2	0.3	0.3	0.4	0.4	0.5	0.6	0.8
Zone 8 Portland Weymouth	0.6	0.6	0.7	0.8	0.8	9.7	11.0	13.0	16.3	20.1
TOTALS	9.8	10.3	11.1	12.0	12.8	118.8	136.5	160.8	202.7	251.5

SOURCE: Tables 2 & 3a.

TABLE 5A

FUTURE RETAIL FLOORSPACE CAPACITY IN WEYMOUTH TOWN CENTRE

SCENARIO: As Table 3a

Growth in sales per sq m from shop floorspace

Convenience Goods: 0.00 % pa 2007-2026

Comparison Goods: 1.5 % pa 2007-2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2012	2017	2022	2026	2007	2012	2017	2022	2026
Residents' Spending £m	9.8	10.3	11.1	12.0	12.8	118.8	136.5	160.8	202.7	251.5
Plus visitors' spending	0.03	0.03	0.03	0.03	0.03	0.2	0.2	0.2	0.2	0.2
Total spending (£m)	9.9	10.3	11.1	12.0	12.9	119.0	136.7	161.0	202.9	251.7
Existing shop floorspace (sq m net)	1,552	1,552	1,552	1,552	1,552	20,654	20,654	20,654	20,654	20,654
Sales per sq m net £	6,364	7,253	7,253	7,253	7,253	5,763	6,000	6,464	6,963	7,501
Sales from extg flrspce (£m)	9.9	11.3	11.3	11.3	11.3	119.0	123.9	133.5	143.8	154.9
Residual spending to support new shops (£m)	0.0	(1.0)	(0.2)	0.7	1.6	0.0	12.8	27.5	59.0	96.8
Sales per sq m net in major foodstores/ comparison shops (£)	12,600	12,600	12,600	12,600	12,600	5,763	6,000	6,464	6,963	7,501
Supportable capacity for major new foodstore (sq m net)	0	(76)	(13)	58	128	0	2,133	4,255	8,479	12,903
Less policy Retail Commitments (net sales are	0	0	0	0	0	0	0	0	0	0
Net capacity for new shop flrspce (sq m net)	**0**	**(76)**	**(13)**	**58**	**128**	**0**	**2,133**	**4,255**	**8,479**	**12,903**

SOURCES: (1) Table 4a.

NOTES:
(1) Excludes vacant shops.
(2) No growth in convenience turnover efficiency assumed.
(3) Comparison growth in turnover efficiency 2007-2026 at 1.5% per annum
(4) Floorspace figures provided by latest Goad Centre Report (Dec 2009)
(5) Goad net sales floorspace calculated at 80% of gross
(6) Sales per sqm for new foodstore based upon average of 'top' five convenience retailers (Morrisons; Tesco; Asda; Waitrose; and Sainsbury's)
(7)There are no commitments in Weymouth Town Centre

Table 5A(i)
SALES CAPACITY OF EXISTING TOWN CENTRE
MAIN FOOD AND CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£m)
Tesco Metro, St Thomas Street, Weymouth	538	80	430	13,261	5.7
Marks & Spencer, St Mary Street, Weymouth	450	100	450	5,942	2.7
Iceland, St Thomas Street, Weymouth	303	91	276	6,125	1.7
Local stores, Weymouth	396	100	396	3,000	1.2
ALL STORES & SHOPS	1,687	-	1,552	7,253	11.3

SOURCES:

(1) Sales Area Floorspace figures provided IGD (2009) and CBRE Estimates
(2) Estimated Company average sale densities from UK Food & Grocer Retailers 2009, Verdict (April 2009)
(3) Percentage of convenivence portion derived from UK Food & Grocer Retailers 2009, Verdict (April 2009)
(4) Tesco Metro percentage for convenience goods allocation assumed by CB Richard Ellis
(5) Floorspace and percentage and convenience proportion for Marks and Spencer takes account of foodhall only

DORCHESTER TOWN CENTRE FORECASTS

TABLE 3B

DORCHESTER TOWN CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 1 - Baseline

Market Shares indicated by Household Interview Survey 2007 remain unchanged throughout forecasting period.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO DORCHESTER TOWN CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2026 (%)	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2026 (%)
Zone 1 Bridport, Lyme Regis	0%	0%	0%	0%	0%	11%	11%	11%	11%	11%
Zone 2 Beaminster	15%	15%	15%	15%	15%	23%	23%	23%	23%	23%
Zone 3 Central West Dorset	28%	28%	28%	28%	28%	63%	63%	63%	63%	63%
Zone 4 North Weymouth	9%	9%	9%	9%	9%	29%	29%	29%	29%	29%
Zone 5 Dorchester	41%	41%	41%	41%	41%	70%	70%	70%	70%	70%
Zone 6 Weymouth	1%	1%	1%	1%	1%	6%	6%	6%	6%	6%
Zone 7 Sherborne	2%	2%	2%	2%	2%	4%	4%	4%	4%	4%
Zone 8 Portland Weymouth	0%	0%	0%	0%	0%	6%	6%	6%	6%	6%

SOURCE: Table 3b(i) and Household Interview Survey (2007).

TABLE 3B(i)

CONVENIENCE GOODS 2007

ALLOCATIONS TO TOWN CENTRE 2007	Main Food Q1	Top-up convenience Q4	WEIGHTED AVERAGE
Expenditure Weighting:	80	20	100
Zone	(%)	(%)	(%)
Zone 1 Bridport, Lyme Regis	0%	1%	0%
Zone 2 Beaminster	15%	14%	15%
Zone 3 Central West Dorset	24%	42%	28%
Zone 4 North Weymouth	9%	7%	9%
Zone 5 Dorchester	38%	54%	41%
Zone 6 Weymouth	1%	1%	1%
Zone 7 Sherborne	2%	1%	2%
Zone 8 Portland Weymouth	0%	2%	0.3%

SOURCE: Household Interview Survey (2007).

TABLE 4B

FORECAST RETAIL SALES IN DORCHESTER TOWN CENTRE (2007 prices)

SCENARIO:	**As Table 3b**									
Catchment zone	RETAIL SALES IN DORCHESTER TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)
Zone 1 Bridport, Lyme Regis	0.1	0.1	0.1	0.1	0.1	7.5	8.6	10.3	13.1	16.4
Zone 2 Beaminster	2.2	2.3	2.5	2.7	3.0	5.4	6.3	7.4	9.5	11.9
Zone 3 Central West Dorset	5.7	6.2	7.0	7.8	8.6	20.8	24.8	30.6	40.0	51.1
Zone 4 North Weymouth	4.2	4.4	4.6	5.0	5.3	23.0	26.4	30.6	38.4	47.6
Zone 5 Dorchester	11.2	12.0	13.3	14.7	16.2	31.0	36.6	44.1	57.2	72.6
Zone 6 Weymouth	0.4	0.5	0.5	0.5	0.6	6.3	7.2	8.6	10.8	13.4
Zone 7 Sherborne	0.8	0.8	0.9	0.9	1.0	3.0	3.4	4.0	5.0	6.2
Zone 8 Portland Weymouth	0.0	0.0	0.0	0.0	0.0	0.9	1.0	1.2	1.5	1.8
TOTALS	24.6	26.2	28.8	31.8	34.8	97.9	114.5	136.8	175.5	220.9

SOURCE: Tables 2 & 3b.

TABLE 5B

FUTURE RETAIL FLOORSPACE CAPACITY IN DORCHESTER TOWN CENTRE

SCENARIO:	**As Table 3b**									
Growth in sales per sq m from shop floorspace										
Convenience Goods:	0.00 % pa 2007-2026					Comparison Goods:	1.5 % pa 2007-2026			
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2012	2017	2022	2026	2007	2012	2017	2022	2026
Residents' Spending £m	24.6	26.2	28.8	31.8	34.8	97.9	114.5	136.8	175.5	220.9
Plus visitors' spending	0.06	0.06	0.06	0.06	0.06	0.19	0.19	0.19	0.19	0.19
Total spending (£m)	24.7	26.3	28.9	31.9	34.9	98.1	114.6	137.0	175.7	221.1
Existing shop floorspace (sq m net)	2,990	2,990	2,990	2,990	2,990	19,799	19,799	19,799	19,799	19,799
Sales per sq m net £	8,247	7,612	7,612	7,612	7,612	4,956	6,000	6,464	6,963	7,501
Sales from extg flrspce (£m)	24.7	22.8	22.8	22.8	22.8	98.1	118.8	128.0	137.9	148.5
Residual spending to support new shops (£m)	0.0	3.5	6.1	9.1	12.1	0.0	(4.2)	9.1	37.8	72.6
Sales per sq m net in major foodstores/ comparison shops (£)	12,600	12,600	12,600	12,600	12,600	4,956	6,000	6,464	6,963	7,501
Supportable capacity for major new foodstore (sq m net)	0	282	484	725	964	0	(692)	1,402	5,431	9,676
Less policy Retail Commitments	0	0	0	0	0	0	0	0	0	0
Net capacity for new shop flrspce (sq m net)	**0**	**282**	**484**	**725**	**964**	**0**	**(692)**	**1,402**	**5,431**	**9,676**

SOURCES: (1) Table 4a.

NOTES:
(1) Excludes vacant shops.
(2) No growth in convenience turnover efficiency assumed.
(3) Comparison growth in turnover efficiency 2007-2026 at 1.5% per annum
(4) Floorspace figures provided by latest Goad Centre Report (Dec 2009)
(5) Goad net sales floorspace calculated at 80% of gross
(6) Sales per sqm for new foodstore based upon average of 'top' five convenience retailers (Morrisons; Tesco; Asda; Waitrose; and Sainsbury's)
(7)There are no commitments in Weymouth Town Centre

Table 5B(i)

SALES CAPACITY OF EXISTING CITY CENTRE

MAIN FOOD AND CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Convenience Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£m)
Somerfield, Trinity Street, Dorchester	1,028	74	761	6,900	5.2
Marks & Spencer, Dorchester	836	30	251	5,942	1.5
Waitrose, Tudor Arcade, South Street, Dorchester	1,254	80	1,003	11,571	11.6
Iceland, Dorchester	522	91	475	6,125	2.9
Local Stores, Dorchester	500	100	500	3,000	1.5
ALL STORES & SHOPS	4,140		2,990	7,612	22.8

SOURCES:

(1) Sales Area Floorspace figures provided IGD (2009) and CBRE Estimates

(2) Estimated Company average sale densities from UK Food & Grocer Retailers 2009, Verdict (April 2009)

(3) Percentage of convenivence portion derived from UK Food & Grocer Retailers 2009, Verdict (April 2009)

WEST DORSET NON CENTRAL FORECASTS

TABLE 3G

WEST DORSET NON-CENTRAL STORES DRAW UPON THE CATCHMENT AREA.

SCENARIO: 1 - Baseline

Market Shares indicated by Household Interview Survey 2007 remain unchanged throughout forecasting period.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO NON CENTRAL STORES									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2026 (%)	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2026 (%)
Zone 1 Bridport, Lyme Regis	38%	38%	38%	38%	38%	26%	26%	26%	26%	26%
Zone 2 Beaminster	39%	39%	39%	39%	39%	49%	49%	49%	49%	49%
Zone 3 Central West Dorset	63%	63%	63%	63%	63%	20%	20%	20%	20%	20%
Zone 4 North Weymouth	86%	86%	86%	86%	86%	11%	11%	11%	11%	11%
Zone 5 Dorchester	56%	56%	56%	56%	56%	13%	13%	13%	13%	13%
Zone 6 Weymouth	89%	89%	89%	89%	89%	10%	10%	10%	10%	10%
Zone 7 Sherborne	41%	41%	41%	41%	41%	67%	67%	67%	67%	67%
Zone 8 Portland Weymouth	92%	92%	92%	92%	92%	12%	12%	12%	12%	12%

SOURCE: Tables 3g(i) and 3g(ii).

TABLE 3G (i)

CONVENIENCE GOODS 2007

ALLOCATIONS TO NON CENTRAL STORES 2007	Main Food Q1	Top-up convenience Q4	WEIGHTED AVERAGE
Expenditure Weighting:	80	20	100
Zones	(%)	(%)	(%)
Zone 1 Bridport, Lyme Regis	47%	2%	38%
Zone 2 Beaminster	38%	40%	39%
Zone 3 Central West Dorset	67%	46%	63%
Zone 4 North Weymouth	88%	78%	86%
Zone 5 Dorchester	59%	42%	56%
Zone 6 Weymouth	94%	68%	89%
Zone 7 Sherborne	41%	43%	41%
Zone 8 Portland Weymouth	91%	95%	92%

SOURCE: Household Interview Surveys (2007).

TABLE 4G

FORECAST RETAIL SALES IN NON CENTRAL STORES (2007 prices)

SCENARIO:	**As Table 3g**									
Catchment zone	RETAIL SALES IN NON-CENTRAL STORES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)
Zone 1 Bridport, Lyme Regis	16.6	17.5	19.1	20.8	22.5	18.4	21.3	25.5	32.3	40.4
Zone 2 Beaminster	5.6	5.9	6.4	7.0	7.6	11.4	13.2	15.6	19.9	24.9
Zone 3 Central West Dorset	12.9	13.9	15.7	17.6	19.5	6.6	7.8	9.7	12.6	16.1
Zone 4 North Weymouth	41.7	43.4	46.1	49.7	53.3	8.8	10.1	11.7	14.8	18.3
Zone 5 Dorchester	15.3	16.4	18.1	20.1	22.1	5.9	7.0	8.4	10.9	13.8
Zone 6 Weymouth	59.5	62.1	67.1	72.5	77.8	10.7	12.2	14.4	18.2	22.6
Zone 7 Sherborne	20.7	21.5	22.8	24.5	26.2	53.9	61.5	71.4	89.4	110.3
Zone 8 Portland Weymouth	8.9	9.3	10.0	10.7	11.5	1.9	2.2	2.5	3.2	3.9
TOTALS	181.2	190.0	205.2	222.9	240.5	117.5	135.3	159.2	201.2	250.3

SOURCE: Tables 2g & 3g.

TABLE 5G

FUTURE RETAIL FLOORSPACE CAPACITY IN NON CENTRAL AREAS

SCENARIO: **As Table 3g**

Growth in sales per sq m from shop floorspace

Convenience Goods: 0.00 % pa 2007-2026 | Comparison Goods: 1.5 % pa 2007-2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2012	2017	2022	2026	2007	2012	2017	2022	2026
Residents' Spending £m	181.2	190.0	205.2	222.9	240.5	117.5	135.3	159.2	201.2	250.3
Plus visitors' spending	0.05	0.05	0.05	0.05	0.05	0.01	0.01	0.01	0.01	0.01
Total spending (£m)	181.3	190.1	205.3	223.0	240.5	117.5	135.4	159.3	201.2	250.3
Existing shop floorspace (sq m net)	12,323	12,323	12,323	12,323	12,323	15,149	15,149	15,149	15,149	15,149
Sales per sq m net £	14,704	11,137	11,137	11,137	11,137	7,754	7,754	8,353	8,998	9,694
Sales from extg flrspce (£m)	181.2	137.2	137.2	137.2	137.2	117.5	117.5	126.5	136.3	146.9
Residual spending to support new shops (£m)	0.0	52.8	68.0	85.7	103.2	0.0	17.9	32.7	64.9	103.5
Sales per sq m net in new shops (£)	12,600	12,600	12,600	12,600	12,600	7,754	7,754	8,353	8,998	9,694
Supportable capacity for new shop flrspce (sq m net)	0	4,187	5,394	6,798	8,193	0	2,305	3,915	7,214	10,673
(sq m net)		3,611	3,611	3,611	3,611		9,855	9,855	9,855	9,855
Net capacity for new shop flrspce (sq m net)	**0**	**576**	**1,783**	**3,187**	**4,582**	**0**	**(7,550)**	**(5,940)**	**(2,641)**	**818**

SOURCES: Table 4g.

NOTES:

(1) Comparison goods retail floorspace IGD (2009)

(2) Sales per sqm for new foodstore based upon Verdict average sales per outlet data for 2008/2009

(3) Comparison goods gross retail floorspace based on information provided by GOAD Experian and CBRE estimates.

(4) Convenience commitments (excluding the Asda and New Look) at 2012 total **3,611 sqm net:**

467 sqm net - Castle Court, Ospret Quay, Portland

1,844 sqm net - Easton Portland

1,300 sqm net - The Brewery, Dorchester

(5) Comparison commitments (excluding the Asda and New Look) at 2012 total **9,855 sqm net:**

5,840 sqm net (7,300 sq m gross assuming 80/20 split) - Mount Plesant, New Look Site

1,230 sqm net - Castle Court, Ospret Quay, Portland

2,785 sqm net - Wikes DIY

(6) No growth in convenience turnover efficiency assumed.

(7) Comparison growth in turnover efficiency 2007-2026 at 1.5% per annum

(8) Sales per sqm for new foodstore based upon average of 'top' five convenience retailers

(9) Existing comparison floorspace derived from retail warehouses and comparison element of convenient stores.

Table 5G (i)
SALES CAPACITY OF EXISTING NON-CENTRAL
MAIN FOOD AND CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convenience Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£m)
Weymouth					
Asda, Newstead Road, Weymouth	2,485	79	1,963	12,702	24.9
Morrisons, Dorchester Road, Weymouth	4,023	71	2,856	14,230	40.6
Somerfield, Littlemoor, Weymouth	1,463	74	1,083	6,900	7.5
Co op, Easton, Portland, Weymouth	445	71	316	5,490	1.7
Lidl, Dorchester Road, Weymouth	836	72	602	4,410	2.7
Aldi, Jubilee Retail Park, Weymouth	650	67	436	5,664	2.5
Co op, Fortuneswell, Portland, Weymouth	147	71	105	5,490	0.6
Tesco Express, Lanehouse Rocks Road, Weymouth	130	90	117	13,261	1.6
Welcome (South West), Preston, Weymouth	130	95	123	6,442	0.8
Co-op, Portland Road, Wyke Regis, Weymouth	167	71	119	5,490	0.7
Tesco, Dorchester Road, Weymouth	134	60	80	13,261	1.1
Total			**7,799**		**84.5**
Dorchester					
Tesco Retail Park, Dorchester	2,400	60	1,440	13,261	19.1
Budgens Poundbury	139	85	118	5,972	0.7
Bridport					
Morrisons, Asker Meadows Retail Park, West Bay Road Bridport	2,118	71	1,504	14,230	21.4
Sainsbury's Local - Retail development on the former	371	90	334	11,238	3.8
Lyme Regis					-
Co-op, 38 Broad Street, Lyme Regis, Dorset	144	71	102	5,490	0.6
Beaminster					-
Co-op (South West), High Street, Beaminster	142	71	101	5,490	0.6
Sherborne					-
Sainsburys, Ludbourne Road, Sherbourne	1,380	67	925	11,238	10.4
ALL STORES & SHOPS	**17,305**	-	**12,323**	**11,137**	**137.2**

SOURCES:

(1) Sales Area Floorspace figures provided IGD (2009) and CBRE Estimates
(2) Estimated Company average sale densities from UK Food & Grocer Retailers 2009, Verdict (April 2009)
(3) Percentage of convenience portion derived from UK Food & Grocer Retailers 2009, Verdict (April 2009).
(4) Tesco Express and Sainsburys Local percentage for convenience goods allocation assumed by CBRE
(5) Company sales density for Budgens taken from Verdict average sales outlet data for 2007
(6) Since previous 2008 Study existing convenience floorspace has increased by 1,142 sqm. (This includes 771 sqm net extension to Morrisons, Weymouth and completion of Sainsbury's Local, assumed to be approximatly 371 sqm net, on the former Old Garage site, Bridport Road).

Table 5G (ii)

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES

Stores existing in March 2006		Net Flrspce (sq m)	Sales Density (£ per sq m net)	Sales 2007 (£m)
Weymouth				
London Lounge, Dorchester Road, Weymouth		701	1,000	0.7
Wessex Decorators Dorchester Road, Weymout		456	1,000	0.5
Jubilee Sidlings Retail Park, Weymouth				
Powerhouse		741	2,985	2.2
Tiles R Us		438	1,153	0.5
Carpet Right		412	1,086	0.4
Currys		844	6,488	5.5
Matalan		1,221	2,757	3.4
B&Q,		2,790	1,885	5.3
Comet		420	7,171	3.0
Halfords		428	2,327	1.0
Sub total		**8,449**		**22.4**
Dorchester				
Allied Carpets		500	1,409	0.7
Halfords		376	2,327	0.9
Currys		466	5,522	2.6
Sub total		**1,342**		**4.2**
BRIDPORT				
Carpet Right - Retail development on the former Old Garage Site, Bridport Road		**600.0**	1,086.0	0.7
Sub total				
Sherborne				
Sub total		-	-	-
TOTALS		**10,392**	**2,558**	**26.6**

SOURCE:

(1) Floorspace figures taken from Council retail study with 80:20 split Gross to
(2) Since previous 2008 Study existing comparison floorspace has increased by
(3) Estimated Company average sale densities from Verdict 2008/2009

Table 5G (iii)
SALES CAPACITY OF EXISTING NON-CENTRAL
MAIN FOOD AND CONVENIENCE GOODS SHOPS AND STORES (Comparison Element)IN 2007

Store	Net Floorspace (sq m)	Comparison Goods Allocation (%)	Net comparison Goods Floorspace (sq m)	Comparison Goods sales Density (£ per sq m)	Comparison Goods sales (£m)
Weymouth					
Asda, Newstead Road, Weymouth	2,485	21	522	7,746	4.0
Morrisons, Dorchester Road, Weymouth	3,252	29	943	8,018	7.6
Somerfield, Littlemoor, Weymouth	1,463	26	380	2,809	1.1
Co op, Easton, Portland, Weymouth	445	29	129	2,281	0.3
Lidl, Dorchester Road, Weymouth	836	28	234	3,242	0.8
Aldi, Jubilee Retail Park, Weymouth	650	33	215	4,073	0.9
Co op, Fortuneswell, Portland, Weymouth	147	29	43	2,281	0.1
Tesco Express, Lanehouse Rocks Road, Weymouth	130	10	13	8,818	0.1
Welcome (South West), Preston, Weymouth	130	5	6	1,815	0.0
Co-op, Portland Road, Wyke Regis, Weymouth	167	29	48	2,281	0.1
Tesco, Dorchester Road, Weymouth	134	40	54	8,818	0.5
			2,587		
Dorchester					
Tesco Retail Park, Dorchester	2,400	40	960	8,818	8.5
Budgens Poundbury	139	15	21	4,418	0.1
Bridport					
Morrisons, Asker Meadows Retail Park, West Bay Road	2,118	29	614	8,018	4.9
Sainsbury's Local - Retail development on the former	371	10	37	6,997	0.3
Lyme Regis					-
Co-op, 38 Broad Street, Lyme Regis, Dorset	144	29	42	2,281	0.1
Beaminster					-
Co-op (South West), High Street, Beaminster	142	29	41	2,281	0.1
Sherborne					-
Sainsburys, Ludbourne Road, Sherbourne	1,380	33	455	6,997	3.2
ALL STORES & SHOPS	**16,534**	-	**4,758**	**6,836**	**32.5**

SOURCES:

(1) IGD (2009), for floorspace.

(2) Estimated company average sale densities from Verdict 2008/2009 and UK Grocery Retailers 2008/9, Verdict Research Limited

(3) Comparison goods average sales per sq m includes VAT rate