

Appendix 7

# WEST DORSET, WEYMOUTH AND PORTLAND 'REASN' MODEL 2007 - Scenario 2

Project: West Dorset, Weymouth and Portland Joint Retail Study  
 Latest Revision: 08.06.08

TABLE 1  
 CATCHMENT AREA POPULATION FORECASTS

Zone	Area	2007	2012	2017	2022	2026
Zone 1	Bridport, Lyme Regis	29,152	30,348	31,896	33,476	34,740
Zone 2	Beaminster	9,278	9,406	9,596	9,786	9,938
Zone 3	Central West Dorset	13,044	13,837	14,832	15,812	16,596
Zone 4	North Weymouth	31,629	31,888	32,582	33,302	33,878
Zone 5	Dorchester	17,457	18,318	19,413	20,498	21,366
Zone 6	Weymouth	35,872	36,780	38,479	40,194	41,566
Zone 7	Sherborne	32,395	33,179	34,186	35,211	36,031
Zone 8	Portland	13,284	13,588	14,203	14,828	15,328
<b>TOTAL</b>		<b>182,110</b>	<b>187,343</b>	<b>195,186</b>	<b>203,106</b>	<b>209,442</b>

SOURCES:  
 (1) Catchment Area is based CBRE NLSLP (2007).  
 (2) Population estimates derived from 2001 Census.

NOTES:  
 (1) MapInfo's estimate of population of 2005 has been used. The annual rate of growth between 2016-2017 has been used to project to 2022 and beyond.



# WEYMOUTH TOWN CENTRE FORECASTS

TABLE 3a  
WEYMOUTH TOWN CENTRES 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 Beaminstor	0%	0%	0%	0%	0%	2%	2%	2%	2%	2%
Zone 3 Central West Dorset	0%	0%	0%	0%	0%	5%	5%	5%	5%	5%
Zone 4 North Weymouth	4%	4%	4%	4%	4%	39%	39%	39%	39%	39%
Zone 5 Dorchester	1%	1%	1%	1%	1%	6%	6%	6%	6%	6%
Zone 6 Weymouth	10%	10%	10%	10%	10%	61%	61%	61%	61%	61%
Zone 7 Sherborne	0%	0%	0%	0%	0%	1%	1%	1%	1%	1%
Zone 8 Portland Weymouth	6%	6%	6%	6%	6%	56%	56%	56%	56%	56%

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 (2005 prices)

Catchment zone	SCENARIO: As Table 3a													
	RETAIL SALES IN WEYMOUTH TOWN CENTRE BY CATCHMENT ZONE								COMPARISON GOODS					
	CONVENIENCE GOODS								2007	2012	2017	2022	2026	
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
Zone 1 Bridport, Lyme Regis	0.2	0.2	0.2	0.2	0.2	0.2	4.6	6.1	8.2	10.9	13.7			
Zone 2 Beaminstor	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.7	0.9	1.2	1.5			
Zone 3 Central West Dorset	0.0	0.0	0.0	0.0	0.0	0.0	1.8	2.4	3.3	4.5	5.7			
Zone 4 North Weymouth	1.5	1.6	1.7	1.8	1.9	33.1	42.4	55.0	71.5	88.0				
Zone 5 Dorchester	0.2	0.2	0.2	0.2	0.3	2.7	3.6	4.9	6.5	8.3				
Zone 6 Weymouth	4.4	4.7	5.1	5.5	5.9	58.8	76.6	101.8	135.1	169.1				
Zone 7 Sherborne	0.2	0.2	0.2	0.2	0.2	0.6	0.8	1.0	1.3	1.6				
Zone 8 Portland Weymouth	1.0	1.1	1.2	1.3	1.4	20.0	26.0	34.6	45.9	57.4				
TOTALS	7.5	7.9	8.6	9.3	9.9	122.3	158.7	209.7	276.8	345.3				

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 existing in 2007 (at 2005 prices)					Comparison Goods:				
Convenience Goods:		0.00 % pa 2005-2026					1.5 % pa 2005-2026				
		2007	2012	2017	2022	2026	2007	2012	2017	2022	2026
Residents'											
Spending £m		7.5	7.9	8.6	9.3	9.9	122.3	158.7	209.7	276.8	345.3
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)		7.5	8.0	8.6	9.3	9.9	122.5	158.9	209.9	277.0	345.5
Existing shop floorspace (sq m net)		1,531	1,531	1,531	1,531	1,531	22,423	22,423	22,423	22,423	22,423
Sales per sq m net £		4,894	8,744	8,744	8,744	8,744	5,463	6,000	6,464	6,963	7,501
Sales from extg floorspace (£m)		7.5	13.4	13.4	13.4	13.4	122.5	134.5	144.9	156.1	168.2
Residual spending to support new shops (£m)		0.0	(5.4)	(4.8)	(4.0)	(3.4)	0.0	24.4	65.0	120.9	177.3
Sales per sq m net in major foodstores/comparison shops (£)		12,713	12,713	12,713	12,713	12,713	5,463	6,000	6,464	6,963	7,501
Supportable capacity for major new foodstore (sq m net)		0	(426)	(374)	(318)	(271)	0	4,065	10,055	17,363	23,639
Less policy commitments		0	0	0	0	0	0	0	0	0	0
<b>Net capacity for new shop floorspace (sq m net)</b>		<b>0</b>	<b>(426)</b>	<b>(374)</b>	<b>(318)</b>	<b>(271)</b>	<b>0</b>	<b>4,065</b>	<b>10,055</b>	<b>17,363</b>	<b>23,639</b>

SOURCES: (1) Table 4a.

NOTES:

- (1) Excludes vacant shops.
- (2) Comparison goods gross retail floorspace based on information provided by GOAD Experian and CBRE estimates.
- (3) Net sales floorspace calculated at 80% of gross, with addition made for retail floorspace on upper floors.
- (4) Sales per sqm for new foodstore based upon average of 'top' five convenience retailers.

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	75	403	14,458	5.8
Marks & Spencer, St Mary Street, Weymouth	450	100	450	11,134	5.0
Iceland, St Thomas Street, Weymouth	303	93	282	4,820	1.4
Local stores, Weymouth	396	100	396	3,000	1.2
<b>ALL STORES &amp; SHOPS</b>	<b>1,687</b>	<b>-</b>	<b>1,531</b>	<b>8,744</b>	<b>13.4</b>

**SOURCES:**

- (1) Sales Area Floorspace figures provided by IGD (2005) and CBRE Estimates  
(2) Estimated Company average sale densities from Verdict (2005).



# DORCHESTER TOWN CENTRE FORECASTS

TABLE 3b  
DORCHESTER TOWN CENTRE'S DRAW UPON THE CATCHMENT AREA.

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%

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

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

TABLE 3b(i)  
CONVENIENCE GOODS 2007

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

SOURCE: Household Interview Survey (2007).

TABLE 4b  
FORECAST RETAIL SALES IN DORCHESTER TOWN CENTRE (2005 prices)

Catchment zone	As Table 3b														
	RETAIL SALES IN DORCHESTER TOWN CENTRE BY CATCHMENT ZONE						COMPARISON GOODS								
	CONVENIENCE GOODS			COMPARISON GOODS			CONVENIENCE GOODS			COMPARISON GOODS					
	2007 (£m)	2012 (£m)	2017 (£m)	2022 (£m)	2026 (£m)	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	8.3	11.0	14.7	19.6	24.6					
Zone 2 Beaminster	1.7	1.8	1.9	2.1	2.2	5.8	7.5	9.8	12.6	15.5					
Zone 3 Central West Dorset	4.5	4.9	5.5	6.1	6.6	22.4	30.2	41.1	55.6	70.7					
Zone 4 North Weymouth	3.3	3.5	3.7	4.0	4.2	25.2	32.2	41.8	54.3	66.9					
Zone 5 Dorchester	8.8	9.6	10.5	11.6	12.5	33.3	44.3	59.7	80.0	101.0					
Zone 6 Weymouth	0.3	0.3	0.3	0.4	0.4	5.7	7.4	9.8	13.1	16.3					
Zone 7 Sherborne	0.6	0.7	0.7	0.8	0.8	3.3	4.3	5.6	7.3	9.0					
Zone 8 Portland Weymouth	0.1	0.1	0.1	0.1	0.1	2.0	2.7	3.5	4.7	5.9					
TOTALS	19.3	20.9	22.9	24.9	26.7	106.0	139.5	185.9	247.1	309.9					

SOURCE: Tables 2 & 3b.

TABLE 5b

## FUTURE RETAIL FLOORSPACE CAPACITY IN DORCHESTER TOWN CENTRE

SCENARIO: As Table 3b		0.00 % pa 2005-2026				1.5 % pa 2005-2026				
Growth in sales per sq m from shop floorspace existing in 2006 (at 2003 prices)		CONVENIENCE GOODS				COMPARISON GOODS				
Convenience Goods:		2007	2012	2022	2026	2007	2012	2017	2022	2026
Residents' Spending £m		19.3	20.9	22.9	26.7	106.0	139.5	185.9	247.1	309.9
Plus visitors' spending		0.06	0.06	0.06	0.06	0.18	0.18	0.18	0.18	0.18
Total spending (£m)		19.3	20.9	22.9	26.8	106.1	139.7	186.1	247.3	310.1
Existing shop floorspace (sq m net)		2,889	2,889	2,889	2,889	18,818	18,818	18,818	18,818	18,818
Sales per sq m net £		6,697	7,786	7,786	7,786	5,640	6,000	6,464	6,963	7,501
Sales from extg flrspace (£m)		19.3	22.5	22.5	22.5	106.1	112.9	121.6	131.0	141.2
Residual spending to support new shops (£m)		0.0	(1.5)	0.4	4.3	0.0	26.8	64.5	116.3	168.9
Sales per sq m net in major foodstores/ comparison shops (£)		12,713	12,713	12,713	12,713	5,640	6,000	6,464	6,963	7,501
Supportable capacity for major new foodstore (sq m net)		0	(122)	33	336	0	4,469	9,973	16,700	22,519
Less policy commitments		0	0	0	0	0	0	0	0	0
Net capacity for new shop flrspace (sq m net)		0	(122)	33	336	0	4,469	9,973	16,700	22,519

SOURCES:

(1) Table 4b.

NOTES:

- (1) Excludes vacant shops.
- (2) Comparison goods gross retail floorspace based on information provided by GOAD Experian and CBRE estimates.
- (3) Net sales floorspace calculated at 80% of gross, with addition made for retail floorspace on upper floors.
- (4) Sales per sqm for new foodstore based upon average of top five convenience retailers.

# 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 Household Interview Survey (2007)

TABLE 3g (i)  
CONVENIENCE GOODS 2007

ALLOCATIONS TO NON CENTRAL STORES 2007					
	Main Food	Top-up convenience	Q1	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 (2005 prices)

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	13.5	14.6	16.0	17.5	18.7	20.5	27.1	36.2	48.3	60.7		
Zone 2 Beaminster	4.4	4.7	4.9	5.2	5.5	12.3	15.8	20.5	26.5	32.6		
Zone 3 Central West Dorset	10.1	11.1	12.4	13.8	14.9	7.1	9.5	12.9	17.5	22.3		
Zone 4 North Weymouth	33.2	34.9	37.1	39.4	41.4	9.7	12.4	16.1	20.8	25.7		
Zone 5 Dorchester	11.9	13.0	14.4	15.8	17.0	6.3	8.5	11.4	15.3	19.3		
Zone 6 Weymouth	39.1	41.7	45.4	49.3	52.7	9.6	12.5	16.6	22.0	27.6		
Zone 7 Sherborne	16.4	17.5	18.7	20.1	21.2	58.4	76.0	99.5	130.2	161.3		
Zone 8 Portland Weymouth	15.0	16.0	17.4	18.9	20.1	4.3	5.6	7.5	9.9	12.4		
TOTALS	143.6	153.4	166.3	180.0	191.5	128.2	167.4	220.7	290.6	361.8		

As Table 3g

SOURCE:

Tables 2g & 3g.

TABLE 5g  
FUTURE RETAIL FLOORSPACE CAPACITY IN NON CENTRAL AREAS

SCENARIO:		As Table 3g					Comparison Goods:				
Growth in sales per sq m from shop floorspace existing in 2007 (2005 prices)		0.00 % pa 2005-2026					1.5 % pa 2005-2026				
Convenience Goods:		2007	2012	2017	2022	2026	2007	2012	2017	2022	2026
Residents'											
Spending £m		143.6	153.4	166.3	180.0	191.5	128.2	167.4	220.7	290.6	361.8
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)		143.7	153.5	166.3	180.0	191.6	128.2	167.4	220.7	290.6	361.8
Existing shop											
floorspace											
(sq m net)		10,805	10,805	10,805	10,805	10,805	19,661	19,661	19,661	19,661	19,661
Sales											
per sq m net £		13,291	10,251	10,251	10,251	10,251	6,521	5,000	5,386	5,803	6,251
Sales from extg											
flrspace (£m)		143.6	110.8	110.8	110.8	110.8	128.2	98.3	105.9	114.1	122.9
Residual											
spending to											
support new											
shops (£m)		0.0	42.7	55.5	69.2	80.8	0.0	69.1	114.8	176.5	238.9
Sales per sq m											
net in new											
shops (£)		12,713	12,713	12,713	12,713	12,713	6,521	5,000	5,386	5,803	6,251
Supportable											
capacity for new											
shop flrspace											
(sq m net)		0	3,355	4,366	5,445	6,355	0	13,821	21,304	30,413	38,217
Less policy											
commitments											
Net capacity											
for new											
shop flrspace											
(sq m net)		0	2,512	3,523	4,601	5,512	0	4,382	11,865	20,974	28,778

SOURCES:

Table 4g.

NOTES:

(1) Comparison goods retail floorspace (GD (2005)

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

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



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)
<b>Weymouth</b>					
Asda, Newstead Road, Weymouth	2,485	49	1,218	16,251	19.8
Morrisons, Dorchester Road, Weymouth	3,252	72	2,341	10,474	24.5
Somerfield, Littlemoor, Weymouth	1,463	77	1,127	6,522	7.3
Co op, Easton, Portland, Weymouth	445	75	334	6,442	2.2
Lidl, Jubilee Retail Park, Weymouth	836	73	610	4,680	2.9
Aldi, Weymouth	650	72	468	4,477	2.1
Co op, Fortuneswell, Portland, Weymouth	147	75	110	6,442	0.7
Tesco Express, Lanehouse Rocks Road, Weymouth	130	58	75	14,458	1.1
Welcome (South West), Preston, Weymouth	130	100	130	6,442	0.8
Co-op, Portland Road, Wyke Regis, Weymouth	167	75	125	6,442	0.8
Tesco, Dorchester Road, Weymouth	134	58	78	14,458	1.1
<b>Total</b>			<b>6,616</b>		<b>63.3</b>
<b>Dorchester</b>					
Tesco Retail Park, Dorchester	2,400	58	1,392	14,458	20.1
Budgens Poundbury	139	85	118	3,428	0.4
<b>Bridport</b>					
Morrisons, Asker Meadows Retail Park, West Bay Road Bridport	2,118	72	1,525	10,474	16.0
<b>Lyme Regis</b>					
Co-op, 38 Broad Street, Lyme Regis, Dorset	144	75	108	6,442	0.7
<b>Beaminster</b>					
Co-op (South West), High Street, Beaminster	142	75	106	6,442	0.7
<b>Sherborne</b>					
Sainsburys, Ludbourne Road, Sherborne	1,380	68	938	10,172	9.5
<b>ALL STORES &amp; SHOPS</b>	<b>16,163</b>	<b>-</b>	<b>10,805</b>	<b>10,251</b>	<b>110.8</b>

SOURCES:

(1) IGD (2005), for floorspace.

(2) Estimated Company average sale densities from Verdict (2005).