

**Table 1a - population estimates and forecasts**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
Total CA	141,402	142,566	144,330	145,973	147,336	149,028	150,829	152,143	153,211	154,685	162,526
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
Population Change		1,164	2,928	4,571	5,934	7,626	9,427	10,741	11,809	13,283	21,124
Population Change (%)		0.82%	2.07%	3.23%	4.20%	5.39%	6.67%	7.60%	8.35%	9.39%	14.94%

**Source/Notes:**

1. 2006-2020 population estimates are taken from the Experian Demographic report for the Catchment Area, generated by DJ in December 2007.

**Table 1b - average convenience goods expenditure per head estimates and forecasts**

Assumed average growth rate	0.8 % per annum										
	2006 £	2007 £	2008 £	2009 £	2010 £	2011 £	2012 £	2013 £	2014 £	2015 £	2020 £
Total CA	1,595	1,611	1,627	1,640	1,654	1,667	1,680	1,694	1,707	1,721	1,791

**Source/Notes:**

- Experian's definition of convenience goods comprises food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods.
- 2006 local expenditure estimates for the total Catchment Area have been sourced from Experian.
- The 2006 total expenditure per head estimate for all convenience goods, including Special Forms of Trading, is £1,623.
- A deduction of 1.7% has been made for Special Forms of Trading at 2005 (Experian Retail Planner Briefing Note 5.1, Table 4.1).
- 2007 and 2008 estimates have been derived by growing the 2006 figures by Experian's recommended medium-term trend rate (+1.0% per annum).
- Estimates for 2008 to 2020 have been derived by growing the 2006 estimates by a rate of +0.8%pa. This is Experian's recommended long-term trend (Experian Retail Planner Briefing Note 5.1, Table 3.1).
- 2006 prices used throughout.

**Table 1c - total potential convenience expenditure estimates (CA residents' spending)**

	2006 £m	2007 £m	2008 £m	2009 £m	2010 £m	2011 £m	2012 £m	2013 £m	2014 £m	2015 £m	2020 £m
Total CA	225.59	229.73	234.89	239.47	243.64	248.41	253.42	257.67	261.56	266.19	291.05
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
£m change		4.13	9.30	13.87	18.04	22.81	27.83	32.08	35.96	40.59	65.45
% £m change		1.83%	4.12%	6.15%	8.00%	10.11%	12.33%	14.22%	15.94%	17.99%	29.01%

**Source/Notes:**

1. Tables 1a and 1b.

**Table 1d - estimations of convenience expenditure inflows and outflows at 2006**

Inflows - tourism expenditure		Outflows - CA residents' spending away from the Island	
Estimated annual spend per visitor	£11.00	Assumed to be no leakage of expenditure.	
Average number of staying visitors each year	821,000		
Total convenience tourism expenditure per annum (£m)	£9.03		

**Source/Notes:**

- The estimated average number of staying visitors each year have been held constant since the DJ 2005 Study.
- The spend per visitor on convenience items in the DJ 2005 Study was estimated to be £10. To provide a 2006 estimate, this figure has been grown by a rate of +0.8%pa and converted to 2006 prices.
- The 2006 spend per head estimate has been held constant over the assessment period.

**Table 1e - total potential convenience expenditure estimates including tourists' expenditure and estimated outflows**

	2006 £m	2007 £m	2008 £m	2009 £m	2010 £m	2011 £m	2012 £m	2013 £m	2014 £m	2015 £m	2020 £m
Total CA	234.63	238.76	243.92	248.50	252.67	257.44	262.45	266.70	270.59	275.22	300.08
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
£m change		4.13	9.30	13.87	18.04	22.81	27.83	32.08	35.96	40.59	65.45
% £m change		1.76%	3.96%	5.91%	7.69%	9.72%	11.86%	13.67%	15.33%	17.30%	27.90%

**Source/Notes:**

1. Tables 1c and 1d.

**Table 2a - population estimates and forecasts**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
Total CA	141,402	142,566	144,330	145,973	147,336	149,028	150,829	152,143	153,211	154,685	162,526
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
Population Change		1,164	2,928	4,571	5,934	7,626	9,427	10,741	11,809	13,283	21,124
Population Change (%)		0.82%	2.07%	3.23%	4.20%	5.39%	6.67%	7.60%	8.35%	9.39%	14.94%

Source/Notes:

1. 2006-2020 population estimates are taken from the Experian Demographic report for the Catchment Area, generated by DJ in December 2007.

**Table 2b - average comparison goods expenditure per head estimates and forecasts (all goods)**

Assumed average growth rate	5.3 % per annum										
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
	£	£	£	£	£	£	£	£	£	£	£
Total CA	2,658	2,818	2,987	3,145	3,312	3,487	3,672	3,867	4,072	4,288	5,551

Source/Notes:

1. 2006 local expenditure estimates for the total Catchment Area have been sourced from Experian.
2. The 2006 total expenditure per head estimate for all comparison goods, including Special Forms of Trading, is £2,828.
3. A deduction of 6.0% has been made for Special Forms of Trading at 2005 (Experian Retail Planner Briefing Note 5.1, Table 4.1).
4. 2007 and 2008 estimates have been derived by growing the 2006 figures by Experian's recommended medium-term trend rate (+6.0% per annum).
5. Estimates for 2008 to 2020 have been derived by growing the 2006 estimates by a rate of +5.3%pa. This is Experian's recommended long-term trend (Experian Retail Planner Briefing Note 5.1, Table 3.1).
6. 2006 prices used throughout.

**Table 2c - total potential comparison expenditure estimates (CA residents' spending on all goods)**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total CA	375.89	401.73	431.10	459.11	487.96	519.72	553.88	588.32	623.85	663.23	902.16
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
£m change		25.83	55.21	83.22	112.07	143.83	177.99	212.43	247.96	287.34	526.27
% £m change		6.87%	14.69%	22.14%	29.81%	38.26%	47.35%	56.51%	65.96%	76.44%	140.00%

Source/Notes:

1. Tables 2a and 2b.

**Table 2d - estimations of comparison expenditure inflows and outflows (all goods) at 2006**

Inflows - tourism expenditure			Outflows - CA residents' spending away from the Island		
Estimated annual spend per visitor		£11.21	Assumed to be equivalent to 5% of residents' spend.		
Average number of staying visitors each year		2,700,000			
Total comparison tourism expenditure per annum (£m)		£30.27			

Source/Notes:

1. The estimated average number of staying visitors each year have been held constant since the DJ 2005 Study.
2. The spend per visitor on comparison items in the DJ 2005 Study was estimated to be £10. To provide a 2006 estimate, this figure has been grown by a rate of +5.3%pa and converted to 2006 prices.
3. The 2006 spend per head estimate has been held constant over the assessment period.

**Table 2e - total potential comparison expenditure estimates including tourists' expenditure and estimated outflows**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total CA	387.37	411.91	439.82	466.43	493.84	524.01	556.46	589.18	622.93	660.35	887.32
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
£m change		24.54	52.45	79.06	106.47	136.64	169.09	201.81	235.56	272.97	499.95
% £m change		6.34%	13.54%	20.41%	27.48%	35.27%	43.65%	52.10%	60.81%	70.47%	129.06%

Source/Notes:

1. Tables 2c and 2d.

**Table 3a - population estimates and forecasts**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
Total CA	141,402	142,566	144,330	145,973	147,336	149,028	150,829	152,143	153,211	154,685	162,526
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
Population Change		1,164	2,928	4,571	5,934	7,626	9,427	10,741	11,809	13,283	21,124
Population Change (%)		0.82%	2.07%	3.23%	4.20%	5.39%	6.67%	7.60%	8.35%	9.39%	14.94%

Source/Notes:

1. 2006-2020 population estimates are taken from the Experian Demographic report for the Catchment Area, generated by DJ in December 2007.

**Table 3b - average Core DIY and Bulky Comparison goods expenditure per head estimates and forecasts**

Assumed average growth rate	3.5 % per annum										
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
	£	£	£	£	£	£	£	£	£	£	£
Total CA	862	865	867	898	929	962	995	1,030	1,066	1,103	1,310

Source/Notes:

- Experian's definition of Core DIY and Bulky Comparison Goods is described in the accompanying report.
- 2006 local expenditure estimates for the total Catchment Area have been sourced from Experian.
- The 2006 total expenditure per head estimate for all convenience goods, including Special Forms of Trading, is £917.
- A deduction of 6.0% has been made for Special Forms of Trading at 2005 (Experian Retail Planner Briefing Note 5.1, Table 4.1).
- 2007 and 2008 estimates have been derived by growing the 2006 figures by Experian's recommended medium-term trend rate (+3.0% per annum, (Experian Retail Planner Briefing Note 5.1, Table 3.1)).
- Estimates for 2008 to 2020 have been derived by growing the 2006 estimates by a rate of +3.5%pa. This is Experian's recommended ultra long-term trend (Experian Retail Planner Briefing Note 5.1, Table 3.1).
- 2006 prices used throughout.

**Table 3c - total potential Core DIY and Bulky Comparison expenditure estimates (CA residents' spending)**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total CA	121.90	123.27	125.17	131.03	136.88	143.30	150.11	156.71	163.34	170.68	212.99
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
£m change		1.37	3.27	9.13	14.98	21.40	28.21	34.81	41.44	48.78	91.09
% £m change		1.13%	2.68%	7.49%	12.29%	17.55%	23.14%	28.56%	33.99%	40.02%	74.72%

Source/Notes:

1. Tables 3a and 3b.

**Table 3d - estimations of Core DIY and Bulky Comparison goods expenditure inflows and outflows at 2006**

Inflows - tourism expenditure	Outflows - CA residents' spending away from the Island
Assumed to be zero.	Assumed to be equivalent to 3% of residents' spend.

Source/Notes:

1. Assumptions made by Drivers Jonas and have been held constant throughout the assessment period.

**Table 3e - total potential Core DIY and Bulky Comparison goods expenditure estimates including tourists' expenditure and estimated outflows**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total CA	118.24	119.57	121.42	127.10	132.77	139.00	145.60	152.01	158.44	165.56	206.60
		<b>2006-07</b>	<b>2006-08</b>	<b>2006-09</b>	<b>2006-10</b>	<b>2006-11</b>	<b>2006-12</b>	<b>2006-13</b>	<b>2006-14</b>	<b>2006-15</b>	<b>2006-20</b>
£m change		1.33	3.17	8.85	14.53	20.76	27.36	33.77	40.19	47.32	88.36
% £m change		1.13%	2.68%	7.49%	12.29%	17.55%	23.14%	28.56%	33.99%	40.02%	74.72%

Source/Notes:

1. Tables 3c and 3d.

**Table 4 - benchmark turnovers of existing foodstore and grocery floorspace on the Island - main stores and centres at 2006**

	total floorspace sq m net	total net convenience % sq m	total net convenience sq m	total net comparison sq m	convenience turnover £ / per sq m	comparison turnover £ / per sq m	2006 total convenience turnover (£m)	2006 total comparison turnover (£m)
<b>Ryde</b>								
Tesco	6,175	67%	4,143	2,032	14,077	8,951	58.32	18.19
Somerfield	1,551	81%	1,261	290	5,302	2,115	6.69	0.61
Iceland	480	93%	448	32	5,197	2,337	2.33	0.07
Other local stores	2,301	90%	2,071	230	3,500	1,000	7.25	0.23
<b>Total</b>	<b>10,507</b>		<b>7,924</b>	<b>2,583</b>			<b>74.59</b>	<b>19.11</b>
<b>Sandown/Bembridge/Lake</b>								
Somerfield	270	81%	220	50	5,302	2,115	1.16	0.11
Morrisons	1,830	78%	1,422	408	9,966	8,063	14.17	3.29
Other local stores	2,092	90%	1,883	209	3,500	1,000	6.59	0.21
<b>Total</b>	<b>4,192</b>		<b>3,524</b>	<b>668</b>			<b>21.92</b>	<b>3.61</b>
<b>Cowes</b>								
Somerfield (East Cowes)	190	81%	155	35	5,302	2,115	0.82	0.08
Somerfield (West Cowes)	390	81%	317	73	5,302	2,115	1.68	0.15
Other local stores	2,504	90%	2,254	250	3,500	1,000	7.89	0.25
<b>Total</b>	<b>3,084</b>		<b>2,725</b>	<b>359</b>			<b>10.39</b>	<b>0.48</b>
<b>Wooton</b>								
Tesco Express	255	85%	217	38	14,077	8,951	3.05	0.34
Other local stores	53	90%	48	5	3,500	1,000	0.17	0.01
<b>Total</b>	<b>308</b>		<b>264</b>	<b>44</b>			<b>3.22</b>	<b>0.35</b>
<b>Newport</b>								
Morrisons	3,423	78%	2,659	764	9,966	8,063	26.50	6.16
Sainsbury's	3,611	74%	2,661	949	9,942	7,543	26.46	7.16
Somerfield	2,639	81%	2,146	493	5,302	2,115	11.38	1.04
Iceland	403	93%	376	27	5,197	2,337	1.96	0.06
M&S	836	94%	785	51	10,788	8,352	8.47	0.42
Lidl	1,100	78%	855	245	3,485	610	2.98	0.15
Other local stores	1,493	90%	1,344	149	3,500	1,000	4.70	0.15
<b>Total</b>	<b>13,505</b>		<b>10,827</b>	<b>2,677</b>			<b>82.45</b>	<b>15.14</b>
<b>Shanklin</b>								
Somerfield	890	81%	724	166	5,302	2,115	3.84	0.35
Lidl	1,480	78%	1,150	330	3,485	610	4.01	0.20
Other local stores	1,514	90%	1,363	151	3,500	1,000	4.77	0.15
<b>Total</b>	<b>3,884</b>		<b>3,237</b>	<b>647</b>			<b>12.62</b>	<b>0.70</b>
<b>Ventnor</b>								
Somerfield	474	81%	386	88	5,302	2,115	2.04	0.19
Other local stores	951	90%	856	95	3,500	1,000	3.00	0.10
<b>Total</b>	<b>1,425</b>		<b>1,241</b>	<b>184</b>			<b>5.04</b>	<b>0.28</b>
<b>Total</b>	<b>36,905</b>	-	<b>29,743</b>	<b>7,161</b>	-	-	<b>210.22</b>	<b>39.67</b>

Source/Notes:

1. Total net convenience and comparison floorspace figures for Tesco, Ryde has been taken from the DPP retail study for the Ryde Tesco call-in inquiry.
2. The gross floorspace figure for Sainsbury's, Newport has been sourced from Application no: P/00136/07 TCP/21952/G . Net floorspace is assumed to be 75% of gross.
3. Estimates of the proportion of net floorspace occupied by convenience goods have been sourced from Verdict 2007.

**Table 5 - turnover forecasts of existing foodstore and grocery floorspace on the Island - main stores and centres**

	2008		2011		2014		2017		2020	
	convenience turnover (£m)	comparison turnover (£m)	convenience turnover (£m)	comparison turnover (£m)	convenience turnover (£m)	comparison turnover (£m)	convenience turnover (£m)	comparison turnover (£m)	convenience turnover (£m)	comparison turnover (£m)
<b>Ryde</b>										
Tesco	59.02	19.00	60.09	20.28	61.18	21.65	62.29	23.11	63.42	24.67
Somerfield	6.77	0.64	6.89	0.68	7.02	0.73	7.14	0.78	7.27	0.83
Iceland	2.36	0.08	2.40	0.08	2.44	0.09	2.49	0.09	2.53	0.10
Other local stores	7.34	0.24	7.47	0.26	7.60	0.27	7.74	0.29	7.88	0.31
<b>Total</b>	<b>75.48</b>	<b>19.96</b>	<b>76.85</b>	<b>21.30</b>	<b>78.24</b>	<b>22.74</b>	<b>79.66</b>	<b>24.27</b>	<b>81.10</b>	<b>25.91</b>
<b>Sandown/Bembridge</b>										
Somerfield	1.18	0.11	1.20	0.12	1.22	0.13	1.24	0.14	1.27	0.14
Morrisons	14.34	3.44	14.60	3.67	14.86	3.92	15.13	4.18	15.41	4.46
Other local stores	6.67	0.22	6.79	0.23	6.91	0.25	7.04	0.27	7.17	0.28
<b>Total</b>	<b>22.19</b>	<b>3.77</b>	<b>22.59</b>	<b>4.02</b>	<b>23.00</b>	<b>4.29</b>	<b>23.41</b>	<b>4.58</b>	<b>23.84</b>	<b>4.89</b>
<b>Cowes</b>										
Somerfield (East Cowes)	0.83	0.08	0.84	0.08	0.86	0.09	0.87	0.10	0.89	0.10
Somerfield (West Cowes)	1.70	0.16	1.73	0.17	1.76	0.18	1.80	0.20	1.83	0.21
Other local stores	7.98	0.26	8.13	0.28	8.27	0.30	8.42	0.32	8.58	0.34
<b>Total</b>	<b>10.51</b>	<b>0.50</b>	<b>10.70</b>	<b>0.53</b>	<b>10.90</b>	<b>0.57</b>	<b>11.09</b>	<b>0.61</b>	<b>11.30</b>	<b>0.65</b>
<b>Wooton</b>										
Tesco Express	3.09	0.36	3.14	0.38	3.20	0.41	3.26	0.43	3.32	0.46
Other local stores	0.17	0.01	0.17	0.01	0.18	0.01	0.18	0.01	0.18	0.01
<b>Total</b>	<b>3.26</b>	<b>0.36</b>	<b>3.32</b>	<b>0.39</b>	<b>3.38</b>	<b>0.41</b>	<b>3.44</b>	<b>0.44</b>	<b>3.50</b>	<b>0.47</b>
<b>Newport</b>										
Morrisons	26.82	6.43	27.31	6.86	27.80	7.33	28.31	7.82	28.82	8.35
Sainsbury's	26.78	7.48	27.26	7.98	27.76	8.52	28.26	9.10	28.77	9.71
Somerfield	11.52	1.09	11.72	1.16	11.94	1.24	12.15	1.32	12.37	1.41
Iceland	1.98	0.06	2.02	0.07	2.05	0.07	2.09	0.08	2.13	0.08
M&S	8.57	0.44	8.73	0.47	8.89	0.51	9.05	0.54	9.21	0.58
Lidl	3.02	0.16	3.07	0.17	3.13	0.18	3.18	0.19	3.24	0.20
Other local stores	4.76	0.16	4.85	0.17	4.93	0.18	5.02	0.19	5.11	0.20
<b>Total</b>	<b>83.44</b>	<b>15.82</b>	<b>84.95</b>	<b>16.89</b>	<b>86.49</b>	<b>18.02</b>	<b>88.06</b>	<b>19.24</b>	<b>89.65</b>	<b>20.54</b>
<b>Shanklin</b>										
Somerfield	3.88	0.37	3.95	0.39	4.03	0.42	4.10	0.45	4.17	0.48
Lidl	4.06	0.21	4.13	0.22	4.21	0.24	4.28	0.26	4.36	0.27
Other local stores	4.83	0.16	4.91	0.17	5.00	0.18	5.09	0.19	5.19	0.21
<b>Total</b>	<b>12.77</b>	<b>0.74</b>	<b>13.00</b>	<b>0.78</b>	<b>13.23</b>	<b>0.84</b>	<b>13.47</b>	<b>0.89</b>	<b>13.72</b>	<b>0.95</b>
<b>Ventnor</b>										
Somerfield	2.07	0.20	2.11	0.21	2.14	0.22	2.18	0.24	2.22	0.25
Other local stores	3.03	0.10	3.09	0.11	3.14	0.11	3.20	0.12	3.26	0.13
<b>Total</b>	<b>5.10</b>	<b>0.29</b>	<b>5.19</b>	<b>0.31</b>	<b>5.29</b>	<b>0.34</b>	<b>5.38</b>	<b>0.36</b>	<b>5.48</b>	<b>0.38</b>
<b>Total</b>	<b>212.75</b>	<b>41.43</b>	<b>216.61</b>	<b>44.23</b>	<b>220.53</b>	<b>47.21</b>	<b>224.52</b>	<b>50.40</b>	<b>228.59</b>	<b>53.80</b>

Source/Notes:

1. Table 4.
2. Turnover estimates for 2008-2020 have been generated by growing the 2006 figures by +2.2%pa (comparison) and +0.6% (convenience), based on Experian Retail Planner Briefing Note 5.1, Section 8.6.

**Table 6 - turnover of existing comparison floorspace on the Island - main stores and centres at 2006**

Town Centres	Net floorspace sq m	Average turnover £/ sq m	Total Turnover (£m)	Out of centre shopping facilities	Net floorspace sq m	Average turnover £/ sq m	Total Turnover (£m)
Newport	29,683	5,000	148.41				
Ryde	12,683	4,000	50.73				
Shanklin	7,125	3,500	24.94	Newport			
Sandown	2,811	3,500	9.84	B&Q	7,432	2,396	17.80
Ventnor	2,758	3,500	9.65	Matalan	3,066	2,811	8.62
Cowes	5,663	3,500	19.82	Halfords	622	2,372	1.48
East Cowes	406	2,200	0.89				<b>27.90</b>
Freshwater	1,805	2,500	4.51				
Bembridge	485	2,500	1.21	Gunville Estate			
Brightstone	50	2,500	0.13	MFI	1,300	2,501	3.25
Carrisbrooke	201	2,500	0.50	Colemans	1,300	2,018	2.62
Godshill	403	2,500	1.01	Argos	750	8,000	6.00
Lake	275	2,500	0.69	Island Dreams	500	3,534	1.77
Niton	106	2,500	0.27	Carpetright	750	1,483	1.11
Totland	671	2,500	1.68				<b>14.75</b>
Wootton	150	2,500	0.38	River Way Estate			
Yarmouth	739	2,500	1.85	Wakes Carpets	900	1,483	1.33
				Capital	850	8,224	6.99
				Jollyes Pet Foods	850	2,567	2.18
				Magnet	225	1,580	0.36
<b>Sub total</b>	<b>66,013</b>	<b>-</b>	<b>276.50</b>				<b>10.66</b>
				<b>Sub total</b>	<b>18,545</b>	<b>-</b>	<b>53.51</b>

Source/Notes:

1. Net floorspace figures for Newport, Ryde and Shanklin have been sourced from Goad surveys.
2. Net floorspace figures have been sourced from the DJ 2005 Study.
3. Average turnover figures have been taken from the DJ 2005 Study, converted to 2006 prices and rounded.

**Table 7 - turnover forecasts of existing comparison floorspace on the Island - main stores and centres**

Town Centres	2008	2011	2014
Newport	155.02	165.47	176.64
Ryde	52.99	56.56	60.38
Shanklin	26.05	27.80	29.68
Sandown	10.28	10.97	11.71
Ventnor	10.08	10.76	11.49
Cowes	20.70	22.10	23.59
East Cowes	0.93	1.00	1.06
Freshwater	4.71	5.03	5.37
Bembridge	1.27	1.35	1.44
Brightstone	0.13	0.14	0.15
Carrisbrooke	0.52	0.56	0.60
Godshill	1.05	1.12	1.20
Lake	0.72	0.77	0.82
Niton	0.28	0.30	0.32
Totland	1.75	1.87	2.00
Wootton	0.39	0.42	0.45
Yarmouth	1.93	2.06	2.20
<b>Total</b>	<b>288.80</b>	<b>308.28</b>	<b>329.08</b>
<b>Out of centre shopping facilities</b>			
Newport (total)	29.14	31.10	33.20
Gunville Estate (total)	15.41	16.45	17.56
River Way Estate (total)	11.59	12.38	13.21
<b>Total</b>	<b>56.14</b>	<b>59.93</b>	<b>63.97</b>
<b>Turnover from convenience/grocery stores</b>			
Total	41.43	44.23	47.21
<b>Total</b>	<b>386.38</b>	<b>412.44</b>	<b>440.27</b>

Source/Notes:

1. Town centre and out of centre comparison turnover estimates for 2008-2020 have been made by growing the 2006 figures by a rate of +2.2%pa (Experian Retail Planner Briefing Note 5.1, Section 8.6).
2. Turnover from convenience/grocery stores figures have been sourced from Table 5.



**Table 9 - estimates of supportable convenience floorspace**

	<b>2008</b>	<b>2011</b>	<b>2014</b>
Total available convenience goods expenditure (£m)	234.89	248.41	261.56
Total existing convenience turnover (£m)	212.75	212.75	212.75
Over-trading/other stores/leakage (£m)	22.14	35.65	48.81
Tourism expenditure (£m)	9.18	9.40	9.63
Increase in turnover of town centre stores (£m)	0.00	1.33	2.68
Committed convenience turnover (£m)	0.00	30.27	30.82
Allowance for internet trading (£m)	7.05	7.45	7.85
Surplus available convenience goods expenditure (£m)	24.27	6.00	17.08
<u>'Quality' convenience retailer</u>			
Average convenience floorspace turnover requirement (£/sqm)	12,268	12,490	12,716
Estimated supportable convenience floorspace (sales sqm)	<b>2,638</b>	<b>640</b>	<b>1,791</b>
Estimated supportable convenience floorspace (gross sqm)	<b>3,517</b>	<b>854</b>	<b>2,388</b>
<u>'Discount' convenience retailer</u>			
Average convenience floorspace turnover requirement (£/sqm)	5,000	5,091	5,183
Estimated supportable convenience floorspace (sales sqm)	<b>6,472</b>	<b>1,571</b>	<b>4,394</b>
Estimated supportable convenience floorspace (gross sqm)	<b>8,629</b>	<b>2,095</b>	<b>5,859</b>

Source/Notes:

1. Total available convenience goods expenditure figures are taken from Table 1.
2. The 2008 total town centre existing convenience turnover figure has been taken from Table 5. This figure has been held constant up to 2020.
3. Town centre convenience floorspace has been allowed to grow in efficiency by a rate of +0.6%pa. Figures have been sourced from Table 6.
4. Tourism expenditure estimates for 2006 have been sourced from Table 1 and grown at a rate of +0.8%pa.
5. Convenience commitments 2006 turnover figures have been sourced from Table 8 and grown at a rate of +0.6%pa.
6. A deduction for internet trading of 3% of total available convenience goods expenditure has been made at 2008, 2011 and 2014.
7. Surplus available convenience expenditure has been calculated by subtracting the increase in turnover of town centre stores, commitments and internet trading from the increase in turnover of other stores/leakage to mainland and tourism expenditure combined.
8. The average turnover requirement at 2008 of a 'quality' convenience retailer has been sourced from Retail Rankings 2007 and Verdict 2007 and is the average company average of the 'top 4'. The 2008 figure has been grown by a rate of +0.6%pa to generate estimates for 2011-2014.
9. The average turnover requirement at 2008 of a 'discount' convenience retailer has been estimated by Drivers Jonas. The 2008 figure has been grown by a rate of +0.6%pa to generate estimates for 2011-2014.
10. Sales floorspace is estimated to be 75% of gross.
11. All monetary values are expressed in 2006 prices.



**Table 10 - estimates of supportable comparison floorspace - all goods**

	<b>2008</b>	<b>2011</b>	<b>2014</b>
Total available comparison goods expenditure (£m)	431.10	519.72	623.85
Leakage to the mainland (£m) - equates to 5%	21.55	25.99	31.19
Comparison goods expenditure retained on the Island (£m)	409.54	493.74	592.66
Tourism expenditure (£m)	30.27	35.35	41.27
Total existing town centre comparison turnover (£m)	288.80	308.28	329.08
Total comparison turnover of convenience stores (£m)	41.43	44.23	47.21
Total out of centre comparison turnover (£m)	56.14	59.93	63.97
CA committed / proposed comparison turnover (£m)	0.00	40.74	43.48
Allowance for internet trading (£m)	40.95	54.31	71.12
Surplus available comparison goods expenditure (£m)	12.49	21.59	79.06
Average comparison floorspace turnover requirement (£/sqm)	5,000	5,337	5,697
Estimated supportable comparison floorspace (sales sqm)	<b>3,330</b>	<b>5,395</b>	<b>18,501</b>
Estimated supportable comparison floorspace (gross sqm)	<b>4,440</b>	<b>7,193</b>	<b>24,669</b>

Source/Notes:

1. Total available comparison expenditure (all goods) figures are taken from Table 2.
2. Leakage of expenditure to the mainland is assumed to equate to 5% of the total available expenditure and has been held constant.
3. The 2008 total town centre existing comparison turnover figures have been taken from Table 7. Town centre comparison floorspace has been allowed to grow in efficiency by a rate of +2.2%pa.
4. Estimates of the comparison turnover of convenience stores have been taken from Table 5. The figures have been allowed to grow in efficiency by a rate of +2.2%pa.
5. Tourism expenditure estimates for 2006 have been sourced from Table 2 and grown at a rate of +5.3%pa.
6. Comparison commitments 2006 turnover figures have been sourced from Table 8 and grown at a rate of +2.2%pa.
7. A deduction for internet trading of 10% of total available comparison (all goods) expenditure has been made at 2008, growing to 11% at 2011 and 12% at 2014.
8. Surplus available comparison (all goods) expenditure has been calculated by subtracting the CA existing town centre comparison turnover, the comparison turnover of convenience stores, commitments and internet trading allowance from the expenditure retained on the Island figures, plus tourism expenditure.
9. The average turnover requirement at 2008 has been estimated by Drivers Jonas. The 2008 figure has been grown by a rate of +2.2%pa to generate estimates for 2011-2014.
10. Sales floorspace is estimated to be 75% of gross.
11. All monetary values are expressed in 2006 prices.

**Table 11 - estimates of supportable comparison floorspace - Core DIY and Bulky Comparison goods**

	<b>2008</b>	<b>2011</b>	<b>2014</b>
Total available DIY/bulky comparison goods expenditure (£m)	121.42	139.00	158.44
Leakage to the mainland (£m) - equates to 3%	3.64	4.17	4.75
DIY/bulky comparison goods expenditure retained on the Island (£m)	117.77	134.83	153.68
Tourism expenditure (£m)	0.00	0.00	0.00
Total out of centre existing DIY and bulky comparison turnover (£m)	47.14	50.32	53.72
Estimated town centre DIY and bulky comparison turnover (£m)	20.45	21.83	23.30
CA committed / proposed DIY/bulky comparison turnover (£m)	15.49	16.53	17.65
Allowance for internet trading (£m)	11.78	14.83	18.44
Surplus available DIY/bulky comparison goods expenditure (£m)	22.91	31.31	40.57
Average DIY/bulky comparison floorspace turnover requirement (£/sqm)	3,750	4,003	4,273
Estimated supportable DIY/bulky comparison floorspace (sales sqm)	<b>8,729</b>	<b>11,173</b>	<b>13,563</b>
Estimated supportable DIY/bulky comparison floorspace (gross sqm)	<b>12,469</b>	<b>15,962</b>	<b>19,376</b>

Source/Notes:

1. Total available comparison expenditure (DIY/bulky goods) figures are taken from Table 3.
2. Leakage of expenditure to the mainland is assumed to equate to 3% of the total available expenditure and has been held constant.
3. The 2008 total existing DIY/bulky comparison turnover figures have been taken from Table 7. Matalan's turnover has been excluded. Town centre comparison floorspace has been allowed to grow in efficiency by a rate of +2.2%pa.
4. Tourism expenditure on DIY/bulky goods is assumed to be zero.
5. Commitments for DIY/bulky comparison goods development are taken to be the Wakes redevelopment proposal.
6. A deduction for internet trading of 10% of total available comparison (all goods) expenditure has been made at 2008, growing to 11% at 2011 and 12%.
7. Surplus available comparison (DIY/bulky goods) expenditure has been calculated by subtracting existing DIY/bulky goods comparison turnover, commitments and internet trading allowance from the expenditure retained on the Island figures, plus tourism expenditure.
8. The average turnover requirement at 2008 has been estimated by Drivers Jonas. The 2008 figure has been grown by a rate of +2.2%pa to generate estimates for 2011-2014.
9. Sales floorspace is estimated to be 70% of gross.
10. All monetary values are expressed in 2006 prices.