Isle of Wight Council

Retail Study Update

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Prepared on Behalf of Tetra Tech Environment Planning Transport Limited.

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Appendices

1.0 INTRODUCTION

1.1 Instruction

1.1.1 Tetra Tech Planning (formerly WYG) has been commissioned by the Isle of Wight Council ('the Council') to produce an update of the 2018 Isle of Wight Retail Study.

1.1.2 Since the 2018 study was produced, the economic and policy landscape has changed with evolving consumer spending patterns, the global Covid-19 pandemic, and changes to the Use Classes Order in September 2020. The main purpose of the update therefore is to provide a updated evidence base document to support the formulation of development plan policy, as well as providing updated baseline information to assist in the determination of planning applications for retail development.

1.1.3 This study update will be used to support the emerging Island Planning Strategy Development Plan. The Council is currently preparing the plan which will replace the Island Plan Core Strategy (adopted 2012) in providing policies to guide the decision-making process for future planning applications across the island up to 2038 The Island Planning Strategy underwent public consultation in 2017 and most recently in early 2019, and it is anticipated that further consultation on a full draft of the plan will be undertaken in July 2021

1.1.4 For consistency with the 2018 study, this update explores retail needs to 2034. Since the 2018 study was produced, the plan period has been extended from 2034 to 2038. Given the uncertainty with forecasting needs in the long term, and the 10-year timeframe identified by the NPPF when allocating sites, we consider the exploring retail need to 2034 remains applicable.

1.1.5 This update also provides an updated review of the performance of the town centres on the island. The aims and objectives for the Study are to:

- review any relevant changes in retail and town centre policy at the national level to set the context for the review of the compliance of draft policies on such matters within the emerging Island Plan;
- set out the current and emerging economic trends and emerging shifts in retail spending; present health check updates on the function and vitality and viability of the island's town centres;
- produce updated convenience and comparison retail expenditure floorspace capacity projections for the period to 2034;
- provide a review and recommendations on the policy approach in the emerging Local Plan, taking account of the updated evidence base and national policy guidance as well as overall conclusions and recommendations based on each item above.

1.1.6 The study takes account of the empirical research undertaken to support the 2018 study, and utilises the results of the household survey undertaken at that time when calculating the updated quantitative capacity assessments. The study is also informed by research having regard to published recognised retail data including demand/requirements from retailers for presence in the defined town centres.

1.2 Structure of Study

1.2.1 Our study is structured as follows:

- Section 2 outlines the current national and local planning policy context for retail development issues on the Island;
- Section 3 provides a context for the Study by outlining the current and emerging key retail trends in the UK;
- Section 4 provides the socio demographic and sub-regional context and reviews existing and proposed retail provision on the Island;
- Section 5 provides our assessment of quantitative need for further convenience and comparison goods floorspace in the council area over the assessment period;
- Section 6 sets out a review of our updated vitality and viability assessments of the town centres across the Isle of Wight;
- Section 7 summarises our key findings and sets out our recommendations.

2.0 PLANNING POLICY CONTEXT

2.1 Introduction

2.1.1 This section of the Study Update sets out the changes to the planning policy landscape since the 2018 study was produced. It summarises key changes made to the NPPF, updated planning practice guidance and key emerging local planning policies insofar as they are relevant to retail and town centre matters.

2.2 National Planning Policy Framework (NPPF)

2.2.1 The National Planning Policy Framework (NPPF) was last updated in June 2019[1] following a more substantive update in July 2018. The newly revised NPPF retains the 'town centre first' principle and the two key policy tests of sequential approach to site selection and impact. Key changes relating to retail and town centre matters are set out below

- A positive approach to town centre growth, management & adaption - Both policies and decisions should take a positive approach to town centre growth, management and adaptation. The revised document makes reference to diversification, alongside 'adaption', and it requires town centres to *"diversify in a way that can respond to rapid changes in the retail and leisure industries"*

- No longer a requirement for local plans to meet the needs 'in full' over the plan period – Given the uncertainty in forecasting long-term retail trends, policies only need to look at least ten years and not necessarily over the full plan period when allocating sites to meet the 'likely' need for town centre uses.

- Town centre boundaries should be kept under review – Town centre boundaries should be kept under review, where necessary, so that anticipated needs can be accommodated

[1] https://www.gov.uk/government/publications/national-planning-policy-framework--2

- Sequential approach and the test of 'availability' – As an attempt to provide 'clarity' over the much-debated definition of 'availability' of potential sequentially preferable sites is provided. The revised NPPF states a sequentially preferable site is to be considered available if it is "expected to become available within a reasonable period". The definition of what a 'reasonable period' is will no doubt be subject to further debate. The Ministry for Housing, Communities and Local Government (MHCLG) have confirmed to us that they are not intending to provide further clarity in an amended Planning Practice Guidance (PPG) as the Government believes given that circumstances differ in each location this should be decided at a local level.

- Sequential approach and the test of 'suitability' – The revised NPPF requires applicants and local planning authorities demonstrate flexibility on issues such as format and scale and it emphasises that flexibility is required so opportunities to utilise suitable town centre or edge of centre sites are *"fully explored"* (paragraph 87).

- Design year for impact testing - The policy test for retail and leisure proposals outside town centres and which are not in accordance with an up-to-date plan, relating to the impact on town centre vitality and viability has been amended to remove reference to assessing impact up to five years or ten years (subject to size of scheme). Notwithstanding this deletion, more refined guidance on the design year for impact testing is currently set out in the NPPG (Ensuring the Vitality of Town Centre (paragraph 018)

- Office developments outside town centres no longer subject to impact test – This was removed as the Government considered that the approach to office development outside town centres was 'covered sufficiently' by the sequential approach

2.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

2.3.1 National Planning Practice Guidance[2] relating to town centres and retail was updated in July 2019. In terms of guidance relevant to this study update, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places were people want to live, visit and work.

[2] https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres

2.3.2 Paragraph 006 of the Practice Guidance has been updated and it identifies a series of key indicators which are which should be considered when assessing the health of a centre over time. These include:

- The diversity of uses;
- Proportions of vacant street level property;
- Commercial yields on non-domestic property;
- Customers experience and behaviour;
- Retailer representations and any intentions to change representations;
- Commercial rents;
- Pedestrian flows;
- Accessibility; - this includes transport accessibility and accessibility for people with impairments or health conditions, as well as older people with mobility requirements;
- Perceptions of safety and occurrence of crime;
- State of town centre environmental quality;
- Balance between independent and multiple stores;
- The extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
- The opening hours of units and the availability and extent to which there is an evening and night time economy offer.

2.4 Local Planning Policy Context

2.4.1 The adopted local planning policy position has remained unchanged since the 2018 study was undertaken and comprises:

- Island Plan: Isle of Wight Council Core Strategy (including Minerals and Waste) and Development Management Policies DPD – Adopted March 2012
- Brading Neighbourhood Plan – Adopted March 2015

- Brighstone Neighbourhood Plan – Adopted September 2016
- Bembridge Neighbourhood Plan – Adopted July 2017
- Gurnard Neighbourhood Plan – Adopted September 2017
- Freshwater Neighbourhood Plan – Adopted March 2018

Emerging Development Plan Policy

Draft Island Planning Strategy Development Plan

2.4.2 The draft Island Planning Strategy was published in November 2018 with public consultation taking place in January and February 2019. The plan was published alongside a draft policies map and was supported by several background evidence base documents. The next stage of consultation is anticipated in July 2021.

2.4.3 The following draft policies relating to retailing and town centres are set out within the latest draft plan:

Draft Policy SGOE 7 – Supporting and Improving our Town Centres

2.4.4 Draft Policy SGOE 7, Supporting and Improving our Town Centres, sets out the approach to retail and town centre developments. It states that for Newport Town Centre, new retail development should firstly be located in the Primary Shopping Area as defined on the Policy Map before Town Centre, edge-of-centre and then out-of-centre sites are considered. Any proposal for retail development outside of the identified Primary Shopping Area or town centre boundaries would be assessed on a sequential basis as outlined in national policy.

2.4.5 The policy sets out a locally set retail impact assessment threshold for retail development outside of town centre boundaries;

- 750sq m gross for Newport
- 500sq ,m gross for Ryde and Cowes; and
- 350sq m gross for Sandown, Shanklin, Ventnor, Freshwater and East Cowes

2.4.6 The policy also aims to prevent the loss of retail uses at ground floor level within Primary Shopping Area of Newport and other town centre boundaries, stating that applications will be refused for such development unless it can be demonstrated that the viability and vitality of the centre would not be adversely affected by the proposals.

2.4.7 It is noted that the policy suggests that applications for farm shops or small-scale convenience stores which assist in making settlements more sustainable would not be subject to the sustainable approach

2.4.8 A proposed hierarchy of centres is also set out in the supporting text which identifies Newport, Ryde and Cowes as 'Main Town Centres' and Sandown, Shanklin, Freshwater, Ventnor and East Cowes below and classified as 'Local Centres'. A further 11 'Village Centres' are identified and these are set out below:

- Arreton
- Bembridge
- Brading
- Brighstone
- Godshill
- Niton
- Rookley
- St Helens
- Wootton
- Wroxall
- Yarmouth

Draft policy SGO8 – Supporting the Evening Economy

2.4.9 This policy is supportive of development proposals that seek to increase footfall into the centres in the evenings. Proposals that lead to an increase in the evening economy will need to demonstrate how public safety, disturbance and antisocial behaviour are taken into account.

2.5 Summary

2.5.1 This section of the study has reviewed changes to national planning policy and guidance and has set out an overview of the latest emerging local planning policies of pertinence to retail and town centre matters to explore the context for the Study.

2.5.2 National planning policy continues to highlight the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and for retail and leisure uses, they must provide a full assessment of the impact on the vitality and viability of protected centres.

2.5.3 As required by this commission, recommendations on emerging retail and town centre policy will be provided on the basis of updates to the evidence base and national policy guidance within Section 7 of this report.

3.0 CURRENT AND EMERGING TRENDS

3.1 Introduction

3.1.1 In order to set out the wider context for the Study Update, this section provides an overview of prevailing retail trends and the Governments response to 'transform town centres'. This overview draws on recognised retail data sources, including research by Experian, Local Data Company, Global Data and Mintel.

3.2 Economic Context

3.2.1 Covid 19 has had a considerable impact on the UK economy. During lockdown the economy suffered an unprecedented contraction and employment fell significantly. Experian Economics report that consumer demand suffered given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel. In addition:

- investment fell markedly, as waning business confidence and deteriorating financial positions lead to the postponement and cancellation of projects; and
- exports have been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees.

3.2.2 The near-term outlook for consumer spending is weak and despite rollout of vaccines, Experian do not expect pre Covid 19 pandemic levels to be reached until at least the end the year (2021).

3.2.3 In terms of the medium to longer term outlook, it is expected that the recovery will be shaped by the course of the pandemic, Brexit arrangements, and the extent of potential scarring of both to the UK's longer-term economic potential. Experian advise that there are a number of elements that will be key to the pace of recovery:

- The effective treatment of Covid-19 and how long social distancing is in place/scale of these measures;
- How successful the government measure are in mitigating the economic impact on households and businesses;
- The speed of household and business confidence recovery; and
- Trade and supply chain impacts on industry

3.3 Continued Rise in Internet Shopping

3.3.1 Experian in their latest Retail Planner Briefing Note identify that there has been a marked increase in online shopping since the Covid-19 crisis, which has further accelerated the already strong growth trend seen over the past decade. This has lifted the share of internet shopping to a peak of just over 30% of total retail sales at the peak of lockdown.

3.3.2 Internet sales' share in total retail surpassed 19% in 2019 before increasing up to over 30% in 2020 against less than 5% in 2008. The value of internet sales in 2020 is estimated at £102bn at current prices.

3.3.3 After easing in 2021 Experian expect internet market share to continue to grow strongly in the mid term, hitting around 30% in 2027. The pace of e commerce growth is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040.

3.3.4 Experian highlight that whilst the challenge to traditional store-based shopping from internet-based shopping will continue to grow, a number of factors soften the impact. These factors include:

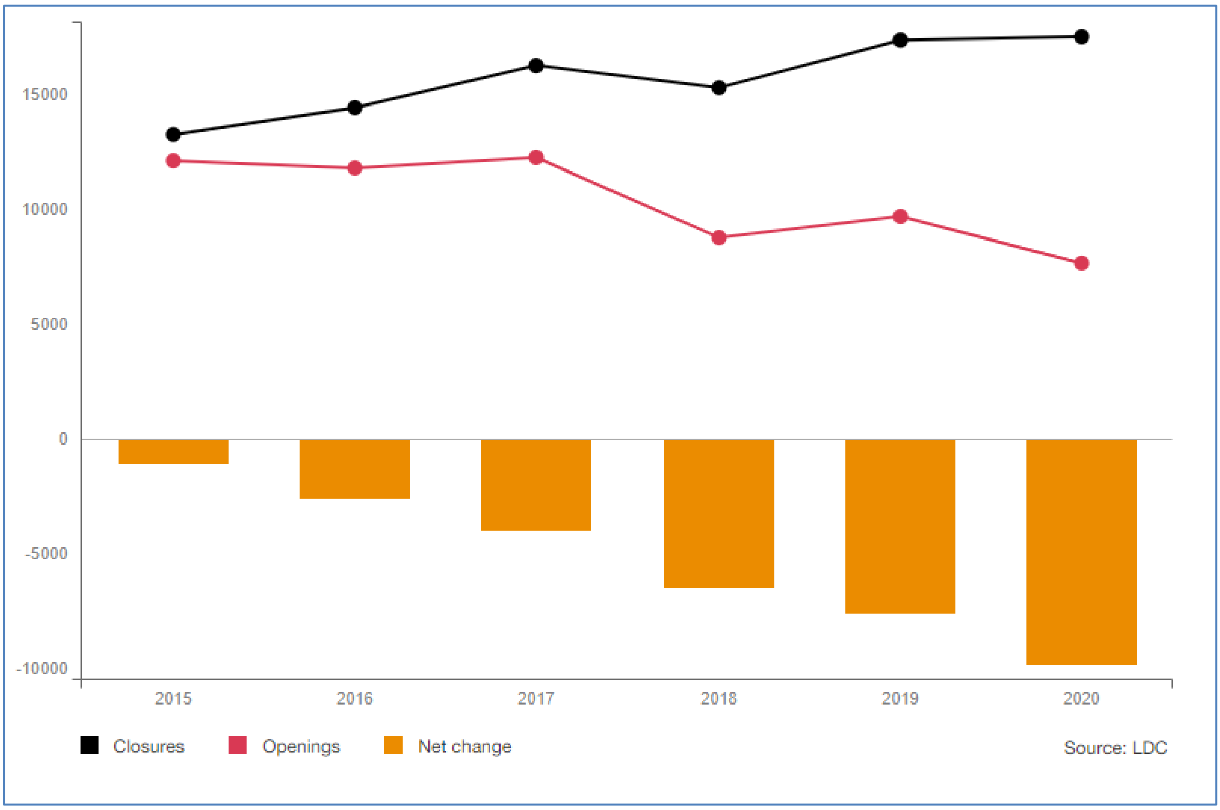
- Many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales;
- Even if non-store retailing outpaces store-based shopping, store-based shopping is still expected to continue to expand at an annual average of 1.2% per annum in per capita terms;
- Click-and-collect is an increasingly popular choice with consumers which requires a bricks-and-mortar presence; and
- A significant development is multi-channelling, where internet shopping actually drives demand for traditional outlets. In-store product and services offer (including collection/drop-off points for online orders (click and collect)) forms part of a co-ordinated multi-channel strategy and will continue to support demand for retail space.

3.4 Increased Vacancy Levels & Store Closures

3.4.1 The last several years have been particularly challenging for retail and leisure operators. The industry is currently under pressure with many occupiers finding themselves in an uncomfortable position as margins are squeezed between weakening demand and rising costs.

3.4.2 The latest data from a report by PWC and Local Data Company (LDC) reported (March 2021) that in 2020 there was a record net loss of 9,877 stores across Great Britain compared with a net loss of 7,648 stores over the equivalent period in 2019 and 6,537 in 2018 (Figure 1.2). Research from November 2020 indicated that closures increased by 21% from 2019-2020, though interestingly, the number of new store openings had increased marginally, albeit this increase is due to market activity pre-Covid-19.

Figure 3.1: Openings and Closures – Jan-Dec 2015 - 2020



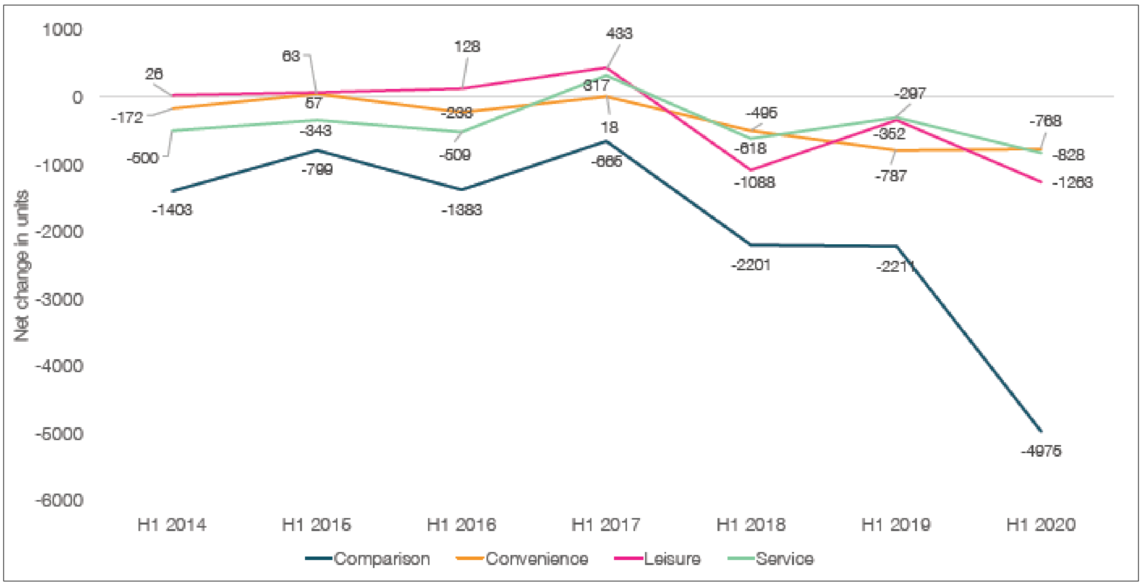
Source: Local Data Company

3.4.3 The research undertaken by LDC identified that, on a sector by sector basis, the comparison goods sector declined the highest in H1 2020 with a net loss of 4,975 units. 500 of these units were as a result of Carphone Warehouse closing all their stores.

3.4.4 The leisure sector saw a loss of some 1,263 units and service sector a loss of 828 units in the first half of 2020. The number of restaurants/pub closures are anticipated to increase by H1 2021 as a result of the impact of Covid-19 (lockdown and curfews).

3.4.5 The number of units in the convenience sector declined by 768, but it was broadly the same as the number of closures in this sector in H1 2019. This is primarily as a result of convenience business remaining open during lockdown.

Figure 1.2: Net Change in Units by Sector



Source: Local Data Company

3.4.6 LDC record that independent businesses were more resilient than national multiples in H1 of 2020 with the decline lower across all four sectors. In fact, the service sector saw a marginal increase (0.1%) primarily as a result of growth in hairdressing and health and beauty.

3.4.7 Many retailers have found themselves struggling to pay their rents and other overheads, such as a rising minimum wage and business rates. This, together with consumers doing more of their shopping online, which has been compounded by Covid-19, has resulted in a large number of retailers over the last two years restructuring (some involving a Company Voluntary Arrangement (CVA)) or going into administration. Since the 2018 Study, these have included:

- Marks & Spencer's announcement that in total it will close 100 stores by 2022. 38 stores were announced as closing in 2018/2019, with a further 17 stores announced for closure in 2019/2020 (January 2019);
- Office Outlet entering administration confirming closure of all its stores (March 2019);
- Boots announcement of plans to close 200 stores by the end of 2020 (July 2019);
- Bathstore falling into administration and subsequently acquired by Homebase. A total of 90 Bathstores have closed with 44 stores to remain open (July 2019);
- Karen Millen (and its subsidiary Coast) going into pre-pack administration with Boohoo acquiring the online business but all 32 stores and 177 concession expected to close (August 2019);

- Jack Wills going into pre-pack administration and with Frasers Groups acquiring the store estate/brand and closing 8 stores (August 2019);
- Thomas Cook entering into administration with Hays Travel acquiring all 555 of its stores (October 2019);
- Mothercare going into administration with its remaining 79 outlets closing (November 2019);
- Bensons for Beds was put into a pre-pack administration and bought by its existing owner (June 2020):
- TM Lewin announced that it would close all 66 of its UK shops after being bought out by a private equity company (July 2020);
- DW Sports entering into administration and subsequently bought by the Frasers Group. 19 retail outlets and 29 leisure clubs were closed (August 2020);
- M&Co going into administration but bought by its previous owners as part of a pre-pack deal. The new owners have closed 47 of its 218 stores (August 2020);
- Arcadia Group, (which owned Topshop, Dorothy Perkins, Burton and Miss Selfridge) falling into administration in November 2020. Though some brands have been bought by internet retailers, notably Topshop and Miss Selfridge by Asos, and Dorothy Perkins by boohoo, these acquisitions did not include physical stores and that the majority of the former group's 444 stores will close;
- Debenhams going into administration (April 2020) with the last remaining bidder, JD Sports, withdrawing in November resulting in the closure of all 124 stores (November 2020);
- Bon Marche entering into administration for the second time in a year with the potential for its 225 stores to close (December 2020);
- Paperchase went through a pre-pack administration process with the closure of 37 of its 127 stores (January 2021);
- John Lewis & Partners has announced it is considering closing a further 8 of its 42 stores, following the closure if 8 announced in 2020 (February 2021);
- Tui have recently announced a further 48 high street stores are to close (March 2021) following an earlier announcement that 166 shops would close in July 2020.

- Peacocks and Jaegar (part of Edinburgh Woollen Mill) falling into administration in November 2020. The Jager brand has subsequently been bought by Marks & Spencer but as of March 2021, Peacocks remains in administration with 423 stores under threat of closure;
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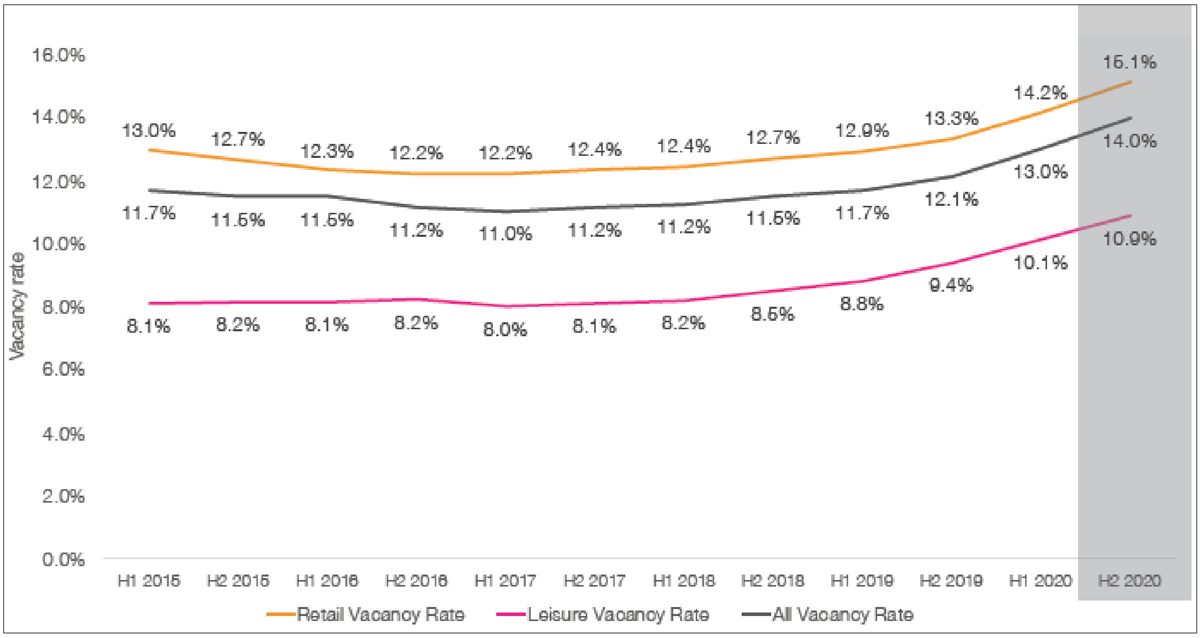
3.4.8 In addition to the above, other retailers/businesses that have restructured or gone into administration over the past year include: Laura Ashley, Cath Kidston, Hawkins Bazaar, Argos, Evans Cycles, Go Outdoors, Monsoon, Oak Furnitureland, Quiz, Oasis and Warehouse.

3.4.9 It is clearly evident that trading conditions for the majority of retailers over the past year have been very difficult/challenging. Such closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years.

3.4.10 The vacancy rate in town centres has been increasing since 2017 from 11% to 13%. LDC forecasted a 1% increase between the 1st and 2nd half of 2020 which would represent the largest increase in a half year. The vacancy rate for both retail and leisure is forecast to increase further with retail anticipated to see a higher increase. The increase in vacancies was already apparent before the Covid-19 with the pandemic accelerating vacancy rates.

Figure 1.3: Vacancy Rate (GB)



Source: Local Data Company

3.5 The Continued Rise of the Grocery Discounters

3.5.1 Shoppers have turned away from food superstores in recent years. Mintel[3] attributes the problems which face superstores to two principal factors.

3.5.2 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

3.5.3 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer, such as wider ranges, better fresh foods and more premium foods, means that they have become an attractive alternative to both large food superstores and to convenience stores.

3.5.4 As a consequence, the 'big four' foodstore operators (Asda, Morrison's, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing foodstores. All four have suffered significant declines in their market share over the past four to five years.

3.5.5 The most recent strategy of the big four operators has been twofold: (1) the continued development of smaller store formats for top-up food shopping; and (2) the reconfiguration and refurbishment of existing foodstores.

3.5.6 The development of smaller store formats (Sainsbury's Local, Tesco Express, Marks & Spencer Simply Food, and Little Waitrose) has been a trend that has taken place over the last 5 or so years. It is a response to changing food shopping habits and the move from weekly shops to more frequent smaller shops. These smaller store formats are important in driving footfall in smaller district/town centres and in some cases act as a vital 'anchor store'.

3.5.7 In terms of the reconfiguration/refurbishment of existing foodstores, in some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses/concessions to take existing floorspace and Sainsbury's acquisition of the Home Retail Group has allowed it to introduce Argos into its stores (and close Argos's standalone stores). Small concessions of Habitat are also currently being tested within a number of Sainsbury's. The introduction of additional uses/concessions in foodstores has the potential to take trade away from town centres.

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[3] https://www.mintel.com/

3.5.8 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and a £1bn investment with plans to open a new store in the UK every week on average until at least September 2021 with a target to have more than 1,000 stores by 2022. Aldi's plans include three formats: standard stores of between 18,000sq ft and 20,000sq ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000sq ft and 14,000sq ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000sq ft to 10,000sq ft with no parking spaces offered. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

3.5.9 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years. Lidl's future requirements reportedly comprise units of between 20,000sq ft and 30,000sq ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes

3.6 Governments Response to 'Transform Town Centres'

3.6.1 The Government recognises that town centres are under pressure and has commissioned various studies over the last several years. In the last 2 years the Government has bought about a number of measures in response to the challenging retail/economic climate and the ongoing Covid-19 pandemic.

3.6.2 These measures include:

- business rate relief to small business;
- a new digital tax;
- funding to support town centres such as the 'Towns Fund' (which comprises the 'Stronger Towns Fund' and 'Future High Street Fund');
- the setting up of the High Streets Task Force;
- additional funding for Business Improvement Districts in response to COVID-19;
- changes to the GPDO; and
- changes to the Use Class Order.

3.6.3 The purpose of the measures is to help revitalise town centres, allowing them to diversify and adapt more quickly to change.

3.6.4 One of the most significant changes that the Government has recently introduced which is likely to impact town centres is the change to the use classes order. The changes were announced in July 2020 and came into effect in September 2020. The changes are set out in the table below.

Class E – Commercial, Business and Services	**Class F1 – Learning and Non-Residential Institutions**	**Class F2 – Local Community**
a) Shops b) Restaurants c) The following services: i. Financial services ii. Professional services iii. Other services appropriate in a commercial, business or service locality d) Indoor sport, recreation or fitness centres e) Medical or health services f) Creches, day nurseries and day centres g) For: i. Offices ii. Research and development iii. Any industrial process	a) Schools and education facilities b) Art galleries c) Museums d) Libraries e) Public or exhibition halls f) Places of worship g) Law courts	a) Shops selling mostly essential goods b) Meeting halls c) Areas for outdoor sport, not involving motorised vehicles or firearms d) Swimming pools and ice rinks

3.6.5 The changes replace the existing Use Classes A1-5 and D1 & D2 and introduce new Class E 'Commercial, Business and Service' and Class F1 'Learning and Non-Residential Institutions' and F2 'Local Community' use classes as well as including new 'sui generis' uses. These changes are intended to allow greater flexibility in uses in town centres allowing for units to be re-occupied quicker and to change use quickly without requiring planning permission. The new Class E encompasses the majority of former A1, A2, A3, B1, D1 and D2 uses and will allow changes to another use within this use class to be made without the need for planning permission. Though introduced to help town centres, the changes may have unforeseen consequences in enabling the development outside town centres to change within the new Use Class E without requiring planning permission (assuming there are no planning condition restriction attached to the relevant planning permission). The changes take control away from Local Planning Authorities and give more freedom to allow the market to decide. This could result in the retail core of some town centres being diluted with other uses potentially weakening its pull as a comparison goods retail destination.

3.6.6 In June 2020, the Government also published a new Business and Planning Bill which aimed to make provision for the promotion of economic recovery and growth following the impacts of the COVID-19 pandemic. The Bill introduced temporary measures to enable pavement licences to be gained efficiently and inexpensively in order to support businesses selling food and drink as lockdown restrictions are lifted and social distancing guidelines remain in place. During summer 2020, alongside the 'Eat Out to Help Out' scheme, this has assisted town centre businesses.

3.6.7 Given that they have only recently been formally announced, the impact of the Government's proposed amendments to the GPDO have not yet been realised. The key changes are:

- permitted development rights to hold a market and temporary use of land (Schedule 2, Part 4, New Class BA);
- permitted development right for the construction of new homes on detached blocks of flats (Schedule 2, Part 20, Class A); and
- permitted development right for the demolition of vacant and redundant free-standing commercial and light industrial premises (and residential blocks of flats) and their replacement with new residential units (Schedule 2, Part 20, New Class ZA).
- The creation of a new class MA into the GPDO granting deemed planning permission for change of use from commercial and business use (class E) to residential (class C3) from 1 August 2021. This right will be subject to a size limit of 1,500sq m of floorspace and will apply to buildings in Class E use for two years, including time in former uses now in that use class.

3.6.8 Whilst alone they are unlikely to have a material positive impact on town centres by resulting in development being bought forward on sites not supported by local plan policy and/or contributing to the defragmentation of the retail offer in centres, there may be cases in the future where they could assist Councils and developers in moving forward town centre proposals at a quicker pace which in turn would benefit the vitality and viability of the town centres.

Funding to Support Town Centres

Future High Street Fund

3.6.9 As part of the 2018 Budget, a new £675 million Future High Streets Fund[4] was announced that is intended to assist local areas to respond/adapt to changes in their town centres, by using long term strategies. There was competition for the funding with local areas expected to partner with the private sector in their proposals, which should set out an overall vision of the specific improvements that would contribute to its achievement. It is envisaged that the Fund will then co-fund projects such as:

- investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town/ city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities', and the regeneration of heritage high streets; and

- investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.'

3.6.10 The fund will also support the regeneration of heritage high streets (up to £55 million of the overall fund). This has two elements: helping to restore historic properties through Historic England; and (2) providing communities with resources to put historic buildings back into economic use.

Stronger Towns Fund

3.6.11 In March 2019, a £1.6 billion Stronger Towns Fund for England was announced by the Government. £1 billion of the new fund is to be allocated using a needs-based formula, with the remaining £600 million being available through a competitive process.

3.6.12 The formula is based on a combination of productivity, income, skills, deprivation metrics and proportion of the population living in towns. This targets funding at those places with economies that are performing relatively less well to the England average, whose residents are living on lower incomes, and where larger proportions of the population have low skill attainment. The Government has allocated some £281m for the North West region.

Towns Fund

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[4] https://www.gov.uk/government/publications/future-high-streets-fund

3.6.13 As of September 2019, the 'Stronger Towns Fund' and 'Future High Street Fund' were combined and are now collectively referred to by the Government as the 'Towns Fund'. The Prime Minister identified that the Towns Fund involves a total fund of £3.6bn. Whilst this has been referred to as a "new" fund MHCLG confirmed in a press release in September 2019 that this involved an additional commitment of £1.325bn over the previous commitments in the 'Stronger Towns Fund' and 'Future High Street Fund'.

3.6.14 The government has invited 100 towns to develop proposals for funding from the £3.6 bn 'Towns Fund'. The towns eligible for support from the fund include places with industrial and economic heritage but have not benefitted from economic growth in the same way as more prosperous areas.

3.6.15 Plans are to be drawn up by communities, business and local leaders with the purpose of transforming their town's economic growth prospects with a focus on improved transport, broadband connectivity, skills and culture.

3.6.16 A total of £241m is available to support towns in 2020-2021, and the 100 towns can bid for up to £25m each. The government published a prospectus in November 2019 to guide towns through the process and set eligibility criteria for funding.

3.6.17 In December 2020, a further £830m in funding was announced to support areas recover from the Covid-19 pandemic and to help transform town centres. 72 areas across England have been earmarked funding.

Reopening High Streets Safely Fund

3.6.18 May 2020 saw the announcement of £50m additional funding to support the safe reopening of high streets following the first coronavirus lockdown. The fund will provide additional funding to local authorities to enable safe trading in public areas with a particular focus on high streets.

3.6.19 The fund aims to support four main strands of activity to support the reopening of local economies:

- Support for the development of a reopening action plan
- Communications and public information activity
- Business-facing awareness activities, focussing on supporting SMEs
- Temporary pubic realm changes

Levelling Up Fund

3.6.20 March 2021 saw the announcement of several new funding streams to help in the recovery from the Covid-19 pandemic, and to assist in the 'levelling-up' of the UK economy and to assist in the regeneration of deprived areas.

3.6.21 The £4.8 billion Levelling Up Fund, jointly funded by the Ministry of Housing, Communities and Local Government (MHCLG) and the Department for Transport will deliver funding through local authorities over the next four years to 2024/25. Funding will be targeted towards areas of the most need and will be allocated following a bid process.

3.6.22 The first stream of funding will focus on several areas, including town centre and high street regeneration and it will focus investment in projects that require up to £20m of funding. In relation to regeneration and town centre investment, the fund will assist local authorities to upgrade 'eyesore' buildings and outdated infrastructure, invest in secure community infrastructure and crime reduction, and to bring public services and community spaces into town and city centres.

3.6.23 Investment will be prioritised to areas assessed in the most need. Each local authority has been given a category of 1, 2 or 3, with those in category 1 representing the highest level of identified need. The majority of local authorities identified within category 1 are in the north of England.

Welcome Back Fund

3.6.24 The government have also recently announced a new £56m 'Welcome Back' fund to support high streets and coastal towns to reopen and promote 'staycations'. The funding can be used by Councils to:

- Invest in street planting, parks, green spaces and seating areas;
- Run publicity campaigns and to prepare events like street markets and festivals to support local businesses;
- Install signage to encourage social distancing;
- Improve the environmental quality of streets through additional planting, removal of graffiti etc.

3.6.25 £9.6million has been allocated to local authorities in the South East of England, including £191,270 to Isle of Wight Council.

4.0 SOCIO DEMOGRAPHIC AND SUB-REGIONAL CONTEXT

4.1 Introduction

4.1.1 This section provides the context to the Study Update, setting out the socio-demographics of the Isle of Wight and outlining any changes that may have occurred since 2018. An updated overview is also provided of the existing retail provision on the Isle of Wight and any recent developments.

4.2 Socio Demographic Context

4.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the administrative area of the Isle of Wight. The results of a similar exercise undertaken for the 2018 study is also provided alongside the national UK average to enable a comparative assessment to be undertaken.

Figure 4.1 – Experian Mosaic Profiling (%)

Mosaic Group	Isle of Wight			UK Average
	2018 Study	2021 Update	Change	
Population (Adults 18+)	118,433	119,061	+628	-
A City Prosperity (18+)	-	-	-	4.4
B Prestige Positions (18+)	2.6	2.3	-0.3	7.2
C Country Living (18+)	12.8	12.8	-	6.9
D Rural Reality (18+)	13.2	13.8	+0.6	7.1
E Senior Security (18+)	17.1	16.4	-0.7	7.5
F Suburban Stability (18+)	6.9	6.8	-0.1	5.5
G Domestic Success (18+)	3.5	2.9	-0.6	8.2
H Aspiring Homemakers (18+)	7.9	8.1	+0.2	9.5
I Family Basics (18+)	5.4	6.4	+1.0	7.5
J Transient Renters (18+)	7.6	9.1	-1.5	6.1
K Municipal Tenants (18+)	0.6	0.7	+0.1	5.8
L Vintage Value (18+)	7.6	7.1	-0.5	5.7
M Modest Traditions (18+)	7.3	7.0	-0.3	4.6
N Urban Cohesion (18+)	0.7	0.7	-	4.9
O Rental Hubs (18+)	6.2	5.7	-0.5	8.9
U Unclassified (18+)	1.3	-	-1.3	-
Total	100	100	-	100

Source: Experian Mosaic Report, February 2018 and March 2021
Notes: Population derived from Mosaic report: 2018 study utilised 2016 estimate Adults 18+ 2021 study utilises 2019 estimates Adults 18+

4.2.2 When compared to the demographics observed in the 2018, the same general trends are evident. The updated Experian Mosaic results show that:

- There continues to a higher proportion of residents within 'Country Living' and 'Rural Reality' than the national average (12.8% to 6.9% and 13.8% to 7.1% respectively). The 'Country Living' category (prosperous owners of country houses/ country loving families pursuing rural idyll/ old families appreciating rural calm in standalone houses/ retirees enjoying pleasant village locations) and 'Rural Reality' category (mature households living in expanding developments/ rural families in affordable village homes/ pensioners living in in-expensive housing/ inter-dependent households living in the most remote communities) are perhaps unsurprisingly higher given the rural nature of much of the island;

- The proportion of residents within the 'Prestige Positions' category (influential families with substantial income/ retired residents in sizeable homes/ high-achieving families living fast track lives/ well-off families in upmarket suburban homes/ mature couples in comfortable detached houses) has fallen slightly since the 2018 study and remains below the national average (2.3% compared to 7.2%) , while there continues to be a significantly higher proportion within 'Senior Security' category (elderly in affordable/comfortable/standard homes) than the national average;

- A similar proportion of residents within the 'Suburban Stability' category (couples with mid-range incomes/pre-retirement couples with respectable incomes/single mature in intermediate occupations/active families with teens/adult children) is evident, while the proportion of those within the 'Family Basics' category has risen from 5.4% at the time of the 2018 study, to 6.4% (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation).

- There continues to be a significantly lower proportion within 'Municipal Tenants' category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats) on the island, while the proportion of 'Transient Renters' (primarily younger population in low cost/social accommodation) has increased;

- due to the rural nature of much of the island there are no residents in the 'City Prosperity' category and only 0.7% in the 'Urban Cohesion' category.

4.2.3 The Mosaic results generally highlight that, when compared to the UK average, the Isle of Wight continues to have a higher proportion of residents within the higher grade and wealthier rural inhabitants Experian Mosaic categories alongside more senior categories. It also highlights that the area contains a slightly lower proportion of aspiring young families/singles.

4.3 Existing Retail Provision in the Isle of Wight

4.3.1 Provided below is a summary of existing retail provision in the eight main towns and surrounding areas.

Centres

4.3.2 Newport, Cowes, East Cowes, Ryde, Sandown, Shanklin, Freshwater and Ventnor are the islands main settlements and are identified as being 'Main Town Centres' within Core Strategy Policy SP1 'Spatial Strategy' and Policy DM9 'Town Centres'.

4.3.3 Newport Town Centre is the County Town on the island, accommodating some 88,710sq m gross of retail and leisure floorspace. Of this floorspace, some 14,440sq m is given to convenience goods, 39,010sq m to comparison goods, 7,360sq m for retail service providers (including hair and beauty salons, opticians and dry cleaners), 14,870sq m to leisure services (including cafes, restaurants, public houses and hotels) and 6,220sq m of financial and business floorspace (banks/financial advisors/solicitors/estate agents). In addition, the town centre also contains a range of other uses including offices, library, religious establishments and some residential uses. These uses attract people to the town centre for reasons other than purely shopping and/or leisure.

4.3.4 The retail composition and floorspace breakdown for the remainder of the centres is summarised in Figure 5.3 below.

4.3.5 A detailed review of the retail composition of each of the town centres is respectively provided in **Appendix A** and summarised in Section 6 of the Study.

4.3.6 The centres continue to be complemented by a number of additional small-scale retail facilities which are provided through scattered shops predominantly located in residential areas. These vary from individual shops to neighbourhood/village shops and local centres.

Figure 4.2: Retail Composition – Floorspace Figures

	Newport	Ryde	Cowes	East Cowes	Sandown	Shanklin	Ventnor	Freshwater
Convenience	14,440	5,700	2,370	3,120	1,130	3,330	1,510	1,190
Comparison	40,030	16,160	6,470	980	3,570	8,750	3,250	2,380
Retail Service	7,360	3,620	1,380	830	710	2,450	700	700
Leisure Service	14,870	11,890	6,070	1,170	12,320	8,090	2,920	1,370
Financial & Business Service	6,220	3,250	1,050	180	740	1,000	490	750
Vacant	5,790	5,400	2,000	450	3,350	3,570	1,380	1,120
Total	88,710	**46,020**	**19,340**	**6,730**	**21,820**	**27,190**	**10,250**	**7,510**

Source: Experian Goad Surveys

Out-of-Centre Retail Provision

4.3.7 There continue to be several retail parks and standalone retail warehouse facilities on the Isle of Wight, all of which are located in Newport. Figure 5.3 below provides details of the main retail parks and stores.

Figure 4.3: main Out-of-Centre Retail parks/Facilities on the Isle of Wight

Key Occupiers	
Newport	
Coppins Bridge Retail Park	Cineworld, Pizza Hut, Burger king, KFC, Gym Group
Carisbrooke Retail Park	Argos, EE, Home Bargains, Dreams and Carpetright.
Wakes Retail Park	Pets at Home, Currys PC World, The Food Warehouse, Dunelm
Riverbank, Newport Harbour	Jollyes, D&S Carpets
Riverway Industrial Estate	Magnet Trade and Topps Tiles
Dodnor Lane	B&Q

Source: Isle of Wight Council, 2021

4.3.8 In terms of out-of-centre foodstore provision, the following larger foodstores (>1,000sq m) are located in the following towns:

Newport

- Asda, St George's Way - 7,727sq m gross floorspace

Ryde

- Tesco Extra, Brading Road - 9,810sq m gross floorspace

Cowes

- Aldi, Airfield Way - 1,587sq m gross floorspace

Sandown

- Morrisons, Newport Road - 3,409sq m gross floorspace
- Aldi, Spithead Bus Park - 1,425sq m gross floorspace

Shanklin

- Lidl, Landguard Manor Road - 1,934sq m gross floorspace

Proposed Out-of-Centre development

4.3.9 In addition to the retail facilities listed above, there are several further developments which are either not yet built out, or have not yet been granted planning permission at the time of writing. These are set out below.

4.3.10 St Georges Park, Newport Football Club

4.3.11 There are currently plans for the development of a 'retail and leisure estate' to the south east of Newport. The site is located on land to the east of St Georges Way and includes Newport Football Club's stadium and club house, which would be relocated.

4.3.12 A planning application was submitted in December 2018 outlining a scheme which would accommodate up to 9,167sq m (gross) of retail and leisure floorspace and would incorporate food and drink facilities too. This application was granted permission in February 2020 but we understand that it is presently subject to a Judicial Review, with hearings set to begin in May 2021. If approved and built out, it is anticipated that this development will be a major draw and will attract visitors from across the Isle of Wight.

Land at Hale Manor Farm

4.3.13 Planning permission was granted in November 2018 for the development of a farm shop with a café/restaurant alongside at Hale Manor Farm, Hale Common. The development would create an additional 852sq m (gross) convenience goods floorspace and 404sq m (gross) of café/restaurant floorspace. We understand that this out-of-centre planning permission has not yet been implemented.

4.4 Summary

4.4.1 This section of the Study identifies that the socio-demographic profile of the Isle of Wight has not significantly changed since 2018. There remains a high proportion of residents classified as Senior Security, summarised as *"elderly in comfortable suburban homes/elderly designed bungalow estate residents/couples enjoying retirement in standard suburban homes/seniors in affordable but pleasant owned homes"* and Rural Reality, summarised as *"mature households living in expanding developments/ rural families in affordable village homes/ pensioners living in in-expensive housing/ inter-dependent households living in the most remote communities,"* and Country Living, summarised as *"wealthy landowners/families in comfortable village homes/retirees/older household appreciating rural calm."*

4.4.2 The convenience goods retail provision continues to be well distributed across the study area, with many of the towns containing a number of foodstores. The comparison goods retail provision on the Island is largely provided at Newport, which offers a variety of goods and contains a number of national multiple retailers. The other town centres, particularly the Bay towns, provide a more limited comparison retail offer, much of which is oriented towards the tourism market.

5.0 QUANTATIVE NEEDS ASSESSMENT

5.1 Introduction

5.1.1 This section of the study update provides an up to date assessment of convenience and comparison goods quantitative needs (retail capacity). The assessment takes into account:

- updated per capita retail expenditure figures published by retail data provider Experian (Micromarketer Generation 3);
- updated retail expenditure growth and Special Forms of Trading (internet) projections published by retail data provider Experian (Retail Planner Briefing Note 18 December 2020));
- updated sales density data published by GlobalData.com; and any new or expired retail planning permissions/commitments since the 2018 Study

5.1.2 The assessment updates the base year to reflect the current year (2021) and, to allow direct comparison with the 2018 Retail Study, it assesses capacity at years 2023 and 2028 and 2034. It also assesses retail capacity at 2031, representing 10 years from the base year and the minimum timeframe identified by the NPPF when allocating sites

5.1.3 For the avoidance of doubt, all other elements of the 2018 study methodology and assumptions remain.

5.2 Updated Convenience Goods Retail Need Assessment

5.2.1 Figure 5.1 below sets out the overall convenience goods floorspace for each of the town centre across the island. It compares the updated floorspace capacity need with that identified for the 2018 study.

5.2.2 It should be noted that since the 2018 study, planning permission has been granted for an extension to the Morrisons foodstore at Newport Rd, Sandown (ref. O/01501/17) creating an additional 1,266sq m of floorspace which we understand has now been built out. Our assessment therefore takes this into account and presents the capacity assessment for Sandown Town Centre before and after this commitment is factored in.

Figure 5.1: Quantitative Need for Convenience Goods Floorspace

Year	2018 Study	2021 Update	Difference
Newport			
2023	-	-	-
2028	-	-	-
2031		-	
2034	-	-	-
Cowes			
2023	300	300	-
2028	300	400	+100
2031		400	
2034	300	400	+100
Year	**2018 Study**	**2021 Update**	**Difference**
Ryde			
2023	-	-	-
2028	-	-	-
2031		-	
2034	-	-	-
Sandown			
Before Commitments			
2023	600	500	-100
2028	700	600	-100
2031		700	
2034	800	700	-100
After commitments			
2023	600	-	-600
2028	700	-	-700
2031		-	
2034	800	-	-800
Shanklin			
2023	-	-	-
2028	-	-	-
2031		-	
2034	-	-	-
Ventnor			
2023	-	-	-
2028	-	-	-
2031		-	
2034	-	-	-
Freshwater			
2023	-	-	-
2028	-	-	-
2031		-	
2034	-	-	-
East Cowes			
2023	-	-	-
2028	-	-	-
2031		-	
2034	-	-	-

Source: Tables 5a, 5b, 6a, 6b, 7a, 7b, 8a, 8b, 9a, 9b, 10a, 10b, 11a, 11b, 12a & 12b of Appendix C

2019 Prices

5.2.3 The updated assessment shows that limited convenience goods floorspace capacity identified by the town centres in the 2018 study is estimated to have reduced to each of the town centres with the exception of Cowes, where the requirement has increased slightly. This general reduction in capacity is primarily as a result of lower convenience goods expenditure forecasts and higher forecast growth in special forms of trading (internet shopping) due to changing consumer behaviour as a result of the Covid-19 pandemic.

5.2.4 It is shown that for:

- Newport – there remains no convenience goods floorspace capacity
- Cowes– convenience goods capacity increased slightly and there is now assessed capacity for 300sq m additional floorspace at 2023, rising to 400sq m at the end of the plan period at 2034.
- Ryde – there remains no capacity for additional convenience goods floorspace
- Sandown – before commitments are taken into account, there is an indicated floorspace capacity of 500sq m at 2023, rising to 700sq m at 2034. Once the Morrisons extension is accounted for however, this capacity is assessed to be absorbed completely.
- Shanklin - there remains no convenience goods floorspace capacity
- Ventnor – there is no assessed additional floorspace capacity
- Freshwater – as with the 2018 study, there is no assessed additional floorspace capacity
- East Cowes – there remains no additional floorspace capacity

5.3 Comparison Goods Retail Need Assessment

5.3.1 Since 2018, we have been made aware of only one additional comparison goods floorspace commitment/planning permission. This is the permitted change of use of the former auction rooms at Regent Street, Shanklin (ref. P/00458/18). The commitment will create up to 400sq m additional retail in the town centre and it is therefore taken into account within our assessment.

5.3.2 The updated assessment of comparison goods quantitative floorspace capacity is set out below at figure 5.2.

Figure 5.2: Quantitative Need for Comparison Goods Floorspace

Year	2018 Study		2021 Update		Difference
Newport					
2023	3,300		1,500		-1,800
2028	8,400		600		-7,800
2031			1,100		
2034	14,800		1,800		-13,00
Cowes					
2023	200		100		-100
2028	400		-		-400
2031			100		
2034	800		100		-700
Ryde					
2023	600		300		-300
2028	1,600		100		-1,500
2031			200		
2034	2,900		300		-2,600
Sandown					
2023	100		100		-
2028	300		0		-300
2031			0		
2034	600		100		-500
Shanklin					
Before Commitments					
2023	200		100		-100
2028	500		-		-500
2031			100		
2034	900		100		-800
After Commitments					
2023	200		-		-200
2028	500		-		-500
2031			-		
2034	900		-		-900
Ventnor					
2023	100		-		-100
2028	200		-		-200
2031			-		
2034	300		-		-300
Freshwater					
2023	-		-		-
2028	-		-		-
2031			-		
2034	-		-		-
East Cowes					
2023	-		-		-
2028	100		-		-100
2031			-		
2034	200		-		-200

Source: Tables 16a, 16b, 17a, 17b, 19a, 19b, 20a ,20b, 21a, 21b, 22a and 22b of Appendix D

5.3.3 The updated assessment shows that the capacity for additional comparison goods floorspace has reduced significantly since 2018. As with convenience capacity, this is again due to changing consumer behaviour coupled with the impact of the ongoing Covid 19 pandemic. It has resulted in:

(1) reduced forecasts of growth in comparison goods expenditure per head;

(2) higher forecasts of growth in internet shopping; and

(3) higher forecast comparison goods sales density growth

5.3.4 It is shown that for:

- Newport– there is now assessed to be capacity of 1,500sq m at 2023 which reduces to 600sq m at 2028 and then rises to 1,100 at 2031 and 1,800sq m at 2034. This is a significant reduction since 2018.
- Cowes – comparison goods capacity remains at 100sq m at 2023, reducing to nil at 2028 and then again rising to 100 at 2031 and 2034.
- Ryde – the capacity for additional floorspace is reduced to 300sqm at 2023, between 100 and 200 between 2028 and 2031 and to 300sq m at 2034.
- Sandown – there is assessed to be minimal additional capacity in Sandown with 100sq m assessed at 2023, reducing to nil at 2028 and 2031, and then rising to 100sq m again at 2034.
- Shanklin – before commitments are taken into account, there is assessed to be minimal additional capacity (between 0 and 100sqm at 2023 – 2034). This is absorbed completely once the extant planning permission is factored into our assessment.
- Ventnor – capacity has reduced and there is now assessed to be no additional comparison goods floorspace capacity in the town centre
- Freshwater – there remains nil additional floorspace capacity in the town centre
- East Cowes – the small amount of capacity identified in 2018 has reduced and there is now assessed to be no additional capacity in the town.

5.3.5 Overall, the updated comparison goods capacity assessments show a general reduction in capacity across the plan period. Newport, Cowes, Ryde and Sandown have some identified additional capacity while the smaller towns have no additional floorspace capacity, reflecting their roles and comparison goods offer.

5.4 Summary

5.4.1 The above assessment identifies that there has been a general reduction in capacity for additional convenience floorspace on the Isle of Wight, though in Cowes, the capacity has slightly increased to between 300 – 400sq m across the plan period. We note that the 2018 study found that many of the existing foodstores on the island were under trading and the updated capacity figures suggest that there continues to be an over provision of convenience goods facilities in general across the island.

5.4.2 Since the 2018 study was produced, spending growth forecasts for comparison goods have reduced while the forecast growth rates in online spending have increased. This has impacted our capacity assessments which indicate a significant reduction in capacity since 2018.

5.4.3 The majority of identified comparison goods floorsapce capacity is identified in Newport (up to 1,800sq m by the end of the plan period) and lower levels of floorspace capacity are identified for Cowes, Ryde and Sandown (between 100sq m and 300sq m by 2034). The other smaller town centres no longer have any capacity for additional floorspace.

6.0 QUALITATIVE RETAIL ASSESSMENT & TOWN CENTRE HEALTH CHECK UPDATES

6.1 Introduction

6.1.1 This section summarises the updated vitality and viability health check appraisals of the 8 town centres across the island, which can be found in full at **Appendix A**.

6.1.2 As Covid-19 travel restrictions prevented detailed site visits to each centre, the appraisals utilise the latest GOAD land use surveys undertaken by Experian to provide updated data on the composition and variety of uses within each centre. These surveys were undertaken in late 2019 and early 2020 and provide a snapshot of each centre prior to the onset of the Covid-19 pandemic. Given this, caution should be taken when reviewing the conclusions as it is possible that the data used many not reflect the current or post-Covid 19 position.

6.2 Newport

6.2.1 The updated appraisal for Newport finds that it displays reasonably good levels of vitality and viability. Newport Town Centre is well represented by convenience and comparison goods providers and provides a strong financial & business service offer, though leisure services remain comparatively under-represented. Despite vacancy rates having increased since 2018, vacancy levels continue to remain below the national average. The centre is considered to provide a good balance of independent and multiple operators and a reasonably good night-time economy which has improved since 2018. Overall, it is considered that there is are no real deficiencies in retail provision within Newport Town Centre.

6.3 Cowes

6.3.1 Our updated assessment for finds that Cowes Town Centre remains relatively healthy. The centre remains very well provided for in terms of comparison goods provision, with a significantly higher proportion of units in the centre than the national average and a strong representation by independent operators which add distinctiveness to the centre and provide a draw for visitors.

6.3.2 Since 2018, the vacancy rate within Cowes has increased, with the latest available data showing 12 additional vacant units though the overall rate remains below the national average. Our appraisal finds that there is a relative under-representation from retail and financial & business service providers within the centre, though we note these services are provided for in Newport which is relatively accessible from the town.

6.4 Ryde

6.4.1 We find that Ryde continues to be well provided for across all retail and service sectors apart from leisure, where there is a relative underrepresentation when compared with other centres nationally. Since 2018, there has been a concerning rise in vacancies within the town centre and though the overall vacancy rate remains below the national average, opportunities should be investigated to reverse this trend.

6.5 Sandown

6.5.1 Sandown Town Centre has been found to display variable characteristics of a viable centre and we consider it to be in need of investment and further diversification to improve its offer and appeal to visitors. Though the centre has reasonably strong comparison goods and leisure service offer, the centre is under provided for by retail service providers and the vacancy rate is much higher than comparable centres elsewhere. As we found in 2018, the an increase in empty units detracts from the environmental quality of the area and some shopfronts are in need of investment.

6.6 Shanklin

6.6.1 Generally, Shanklin displays characteristics a healthy centre with particularly good representation from comparison goods retailers. The financial and business service offer and leisure provision could be improved however, with these sectors being underprovided for. Whilst comparable with the national average, the vacancy rate has increased in line with national trends and this will need to be monitored to ensure that the situation does not deteriorate.

6.7 Ventnor

6.7.1 Ventnor Town Centre continues to serve the needs of both local residents and visitors and it generally provides an attractive and high-quality environment. We are encouraged to note that the vacancy rate within the centre appears to have improved since 2018. As a town focussed more towards the tourism market, it is not surprising that the financial and business service sector in the centre is smaller compared to others on the island, and it is noted that the night time and evening economy offer is good, too.

6.8 Freshwater

6.8.1 Freshwater demonstrates reasonable vitality and viability though several areas are in need of improvement, including in its leisure provision which remains below the national average. We are encouraged that vacancy rates have not increased since 2018 but they are still above the national average and this area will need to be addressed along with additional investment needed in some of the retail units which appear a little dated.

6.9 East Cowes

6.9.1 East Cowes continues to serve most local needs and displays reasonable levels of vitality and viability. The centre provides a good range of convenience goods and retail services, but its financial and business service provision remains relatively lacking. Though the provision of comparison goods units falls below the national average, we consider that the present offer is appropriate for its size and role of the centre. There is good representation by independent operators within East Cowes and the centre provides a reasonably clean and attractive environment. Since 2018, the vacancy rate within East Cowes has marginally increased but it remains below the national average.

7.0 KEY FINDINGS AND RECOMMENDATIONS

7.1 Introduction

7.1.1 This section contains the key findings of the study and provides our overall recommendations. It specifically addresses whether the identified needs set out within the 2018 study have changed, whether the approach to retail within emerging planning policy documents remains relevant in terms of updated national guidance and policy, and how the approach to retail matters may be affected by the changes to the use classes order.

7.2 Updated Summary of Identified Need

Convenience Goods

7.2.1 The 2018 study identified that with the exception of Cowes and Sandown, there was no capacity for additional convenience goods retail floorspace in the centres across the Isle of Wight. Analysis of shopping patterns from the household survey results identified that several stores across the island were under trading which pointed to a general overprovision of convenience goods facilities.

7.2.2 Since the 2018 study was produced, we note that 2 applications for additional convenience goods floorspace have been approved by the Council; an extension to the Morrisons at Sandown (ref. P/01501/17) which has since been built out and provides an additional 1,266sq m of floorspace; and the development of a new farm shop with café/restaurant facilities at Hale Manor Farm, Hale Common (P/01091/18) which has not yet been implemented but would accommodate an additional 852sq m of floorspace.

7.2.3 Consumer behaviour has also changed since the 2018 study was produced, due in part to the ongoing Covid-19 pandemic, with expenditure forecasts revised downwards, while the market for online food shopping has continued to grow. This has resulted in lower forecast future demand for additional convenience goods floorspace.

7.2.4 Our updated assessment has found that there is now only limited capacity for additional floorspace in Cowes during the NPPF minimum 10 year period to 2031, and across the period to 2034 once commitments have been taken into account, as set out below.

Figure 7.1: Quantitative Need for Convenience Goods Floorspace in Cowes

Year	2018 Study		2021 Update		Difference
2023	300		300		-
2028	300		400		+100
2031			400		
2034	300		400		+100

7.2.5 Within the other towns, there remains no capacity for additional convenience goods floorspace across the period to 2034 and it is likely that this trend will continue. As per our recommendations within the 2018 therefore, we do not consider there any need to plan for additional convenience floorspace across the medium to long term.

Comparison Goods

7.2.6 The 2018 study identified that there was capacity for additional comparison goods floorspace across the Isle of Wight, with at least some capacity identified in each of the town centres. As a result, it was recommended that the Council should identify suitable sites in accordance with the sequential approach to site selection in order to accommodate that identified need.

7.2.7 Since the 2018 study, we note that there have been several development proposals that have come forward, including the proposed retail and leisure park at the site of Newport Football Club which is currently subject to a Judicial Review. Should this proposal be built out, it would provide up to 7,589sq m of additional retail floorspace and would likely that the development would draw visitors from across the island.

7.2.8 Our updated assessment indicates that there is a significant reduction in comparison goods floorspace capacity across the Isle of Wight with only small levels of additional floorspace indicated within Cowes, Ryde and Sandown, and an indicated 1,800sq m of capacity in Newport. This is shown in Figure 7.2 below.

7.2.9 The reduction in additional floorspace capacity is again due to changing consumer behaviour coupled with the impact of the ongoing Covid 19 pandemic which has resulted in:

(4) reduced forecasts of growth in comparison goods expenditure per head;

(5) higher forecasts of growth in internet shopping; and

(6) higher forecast comparison goods sales density growth

Figure 7.2: Quantitative Need for Comparison Goods Floorspace

Year	2018 Study	2021 Update	Difference
Newport			
2023	3,300	1,500	-1,800
2028	8,400	600	-7,800
2031		1,100	
2034	14,800	1,800	-13,00
Cowes			
2023	200	100	-100
2028	400	-	-400
2031		100	
2034	800	100	-700
Ryde			
2023	600	300	-300
2028	1,600	100	-1,500
2031		200	
2034	2,900	300	-2,600
Sandown			
2023	100	100	-
2028	300	0	-300
2031		0	
2034	600	100	-500

7.2.10 Should the proposed retail and leisure development at Newport Football Club be approved at Judicial Review, this identified capacity within Newport will be completely absorbed. As there is only a small amount of capacity identified across the plan period within the Cowes, Ryde and Sandown, we do not recommend that the Council should seek to identify any specific sites for retail allocations, but that any proposals for additional retail floorspace should be appraised on their own merits and in accordance with the sequential approach to site selection

7.3 The impact of changes to the use classes order and creation of Class E

7.3.1 As set out in the sections above, one of the most significant changes that the Government has recently introduced in relation to retail and town centre policy is the change to the use classes order and the creation of the new Class E. The changes are intended to allow greater flexibility in uses in town centres allowing for units to be re-occupied quicker and to change use quickly without requiring planning permission.

7.3.2 Given the wider range of uses falling within Class E, and the proposed changes to permitted development rights, controlling specific uses, including former A1 retail use, is likely to be more challenging moving forward, especially when producing masterplans or allocating for new development within centres. Careful consideration should therefore be given when formulating future town centre policies and the use of conditions attached to planning application approvals for retail and town centre uses should be considered, if necessary, to restrict town centre use development proposed outside town centres (in accordance with the use proposed in the planning application and subsequently assessed by the Council).

7.3.3 The ‘town centres’ first approach remains, and the requirement for applicants proposing town centre use development outside town centres to demonstrate compliance with both the impact and sequential approach still forms part of national policy at the current time.

7.3.4 At the current time, the introduction of the new Class E use class does not impact upon the application of the sequential approach. Paragraph 86 of the NPPF makes clear that it should be applied to applications for ‘main town centre uses’ in outside town centres . The glossary of the NPPF identifies that these ‘main town centre uses’ include the majority of uses falling within Class E such as retail, leisure, entertainment, , and offices. We consider that the ‘town centre first’ approach and the requirement for sequential site assessments is likely to continue as part of any forthcoming revisions to the NPPF.

7.4 Review of the approach to retail in the Draft Local Plan

7.4.1 Taking account our updated retail capacity assessments and the changes to retail policy, the use classes order and permitted development rights, we have undertaken a review of the approach to retail set out within Policy SGOE 7 (Supporting and Improving Our Town Centres) within the emerging Draft Island Planning Strategy document.

7.4.2 In general, we consider the approach to retail set out within draft policy is appropriate. The ‘town centre first’ approach and requirement for retail development outside of the Primary Shopping Area in Newport, and the boundaries of the other retail centres remains in conformance with the NPPF.

7.4.3 We note that a locally set tiered retail impact assessment threshold is proposed for development resulting in new retail floorspace outside of town centre boundaries as follows, mirroring our recommendations made within our 2018 retail study:

- 750sq m gross for Newport;
- 500sq m gross for Ryde and Cowes; and
- 350sq m gross for Sandown, Shanklin, Ventnor, Freshwater and East Cowes

7.4.4 Following the assessments undertaken within this study update, and having regard to the current health, performance and composition of each of the centres across the Isle of Wight, we consider that the impact assessment thresholds as proposed remain appropriate.

<u>Protection of Retail uses within town centres</u>

7.4.5 It is noted that the present wording of the draft policy seeks to prevent the loss of A Class uses on the ground floor within the Primary Shopping Area of Newport and the town centre boundaries of the other centres. Given the introduction of the new Class E which covers a wider range of uses than the previous 'A Class' and the changes to permitted development rights which would allow greater flexibility between uses, development plan policy seeking to prevent change of uses from retail to other uses is contrary to this more flexible permissive approach. We therefore recommend that this section of policy is removed.

7.4.6 Similarly, we consider it necessary to re-word the policy section seeking to protect against the loss of traditional shop fronts and it may also be more appropriate to provide this section of policy within those predominantly dealing with the design and appearance:

"Any planning application which results in the loss of traditional shop fronts or removes display windows will be resisted, where the feature is important to the character. ~~and/ or retail function~~ of the area."

Retail Hierarchy

7.4.7 We note that the retail hierarchy as proposed in emerging policy sets out Newport, Ryde and Cowes as Main Town Centres, with Sandown, Shanklin, Freshwater, Ventnor and East Cowes sitting below as Local Centres. Further below this are 11 Village Centres:

- Arreton
- Brighstone
- Rookley
- Wroxall
- Bembridge
- Godshill
- St Helens
- Yarmouth
- Brading
- Niton
- Wootton

7.4.8 In drawing up Local Plans, Paragraph 85 of the NPPF sets out that a network and hierarchy of centres should be defined that allows them to grow, diversify and respond to anticipated future economic changes. In the absence of any definition provided within the NPPF or within the NPPG, the definition of different tiers of the retail hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance.

7.4.9 PPS4 sets out that Town Centres are in many cases the principle centre or centres in a local authority area, and in rural areas they are likely to be market towns and other centres which function as important service centres, providing a range of facilities and services for a wide catchment area. Local Centres are described as being typically smaller and hosting shops of a local nature, serving a small catchment.

7.4.10 The assessments undertaken in 2018 and updated as part of this study, identify that whilst Newport

Town Centre is most dominant for retail purposes, all of the centres function as town centres, providing a range of services which meet the shopping and service needs of the residents of the towns and their catchment areas.

7.4.11 Accordingly, we consider that the centres of Newport, Ryde, Cowes, Sandown, Shanklin, Freshwater, Ventnor and East Cowes continue to be defined as town centres in retail policy terms.

Appendix A

Town Centre Vitality and Viability Health Check Appraisals

Newport Town Centre Health Check Assessment

2018 Health Check Findings

The health check assessment undertaken for the 2018 study identified:

- Newport Town Centre generally provided a good comparison and convenience goods offer;
- leisure service provision and the financial and business services offer in the centre were somewhat lacking
- there was a low vacancy rate across the centre;
- accessibility across Newport Town Centre was generally good, though it is not accessible by rail;
- the centre provided a pleasant environment with good environmental quality; and
- relatively high pedestrian flows were observed along High Street and South Street.

2021 Health Check Update

Diversity of Uses & Retailer Representation

Newport Town Centre accommodates a total of 398 retail units that occupy some 88,170 sqm of gross floorspace. The number of units across the survey area has increased by 11 since 2018, and the amount of floorspace has increased by 3,900 sqm during this time.

In terms of convenience shopping provision, Newport is relatively well-represented with Sainsbury's, Morrisons and Lidl having large stores close to the main shopping core which help to anchor the centre. There are currently 24 convenience retailers across the centre which together represent 6% of the total number of units and 16% of the total floorspace. The proportion of convenience units is below the national average, though, the proportion of floorspace occupied by convenience retailers is slightly above average. We note that convenience provision has weakened slightly since 2018 and there are now two fewer units in the centre.

Convenience retailers are predominantly located in clusters towards the north and south of the centre as well as along Pyle Street.

Turning to comparison goods provision, there are 151 units in total across the centre. Despite there being 18 fewer comparison units in the centre since the 2018 study, the proportion of retail units occupied by comparison retailers remains significantly higher than the national average (38% vs 28%). The proportion of floorspace in the town centre occupied by comparison goods retailers also remains much higher than the national average (44% vs 32%), despite having decreased by 1,610sq m. The vast majority of comparison goods units are distributed within the central core of the town centre along High Street, St James Street, and South Street in particular.

There are 80 leisure service units in the town centre which represent 20% of the total units in Newport and occupy 17% of floorspace. Leisure service provision both in terms of the proportion of units and floorspace occupied are lower than the national average, though things have improved since the 2018 study was undertaken. The leisure service units vary in size across the town centre, the largest are public houses including Hog's Head (860 sqm) and The Man in the Moon (720 sqm), while the smallest unit is a fast food takeaway on St James Square, at 30 sqm.

In terms of retail service provision, there are 69 units in Newport (38% of the total) which occupy some 7,360 sqm, or 44% of the total floorspace. The retail service provision both in terms of units and floorspace occupied is slightly above the national average. When compared to our previous assessment in 2018, retail service provision is shown to have strengthened, with an additional 3 units and 180 sq m of floorspace occupied. The majority of retail service units within Newport comprise of hairdressers, beauty salons and opticians. These units are distributed sporadically across the centre.

The financial and business provision in the centre has strengthened by 1 unit and 510 sqm since 2018. There are now 31 financial and business service units (8% of the total) occupying some 6,220sq m of floorspace (7% of the total). Though the proportion of units falls slightly below the national average (9%), the proportion of floorspace is in line with national average. Of the 31 financial and business services units, these comprise of 9no. estate agents, 7no. retail banks (including Natwest, Barclays, TSB, HSBC, Halifax, Santander and Lloyds), 5 no. solicitors, 2no. insurance offices, 2no. financial advisers, a surveyor, a pawnbroker, a building society, an employment agency, and two other business uses.

Vacancies

Since 2018, the number of vacant units within Newport Town Centre has increased by 11 units and the amount of vacant floorspace has increased by 910 sqm. Notable closures have included TopShop, Topman, Laura Ashley and Cancer Research. There are now a total 43 vacant units across the centre, approximately 11% of the total and 2% below the national average. 8% of the floorspace within Newport is currently vacant, remaining below the national average of 12%. The vacant units are sporadically distributed throughout the centre with the majority being located along High Street. The largest vacant unit within the centre is no. 62 High Street (1060 sqm) followed by 21-22 High Street (460 sqm). We note that both of these have remained unoccupied since the previous study.

Table 1: Diversity of Uses in Newport Town Centre in January 2018

	Units				Floorspace		
	No.	%	UK Average (%)		Sq.m	%	UK Average (%)
Convenience	26	7	9		14,540	17	15
Comparison	169	44	31		40,620	48	36
Retail Service	66	17	14		7,180	8	8
Leisure Service	64	17	24		10,860	13	23
Financial and Business Service	30	8	10		5,710	7	8
Vacant	32	8	11		5,900	7	9
Total	**387**	**100**	**100**		**84,810**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Newport Town Centre in February 2019

	Units				Floorspace		
	No.	%	UK Average (%)		Sq.m	%	UK Average (%)
Convenience	24	6	9		14,440	16	15
Comparison	151	38	28		39,010	44	32
Retail Service	69	17	16		7,360	8	7
Leisure Service	80	20	24		14,870	17	26
Financial and Business Service	31	8	9		6,220	7	7
Vacant	43	11	13		6,810	8	12
Total	**398**	**100**	**100**		**88,710**	**100**	**100**

Source: Experian Goad Survey February 2019
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Newport February 2019

National Operators	Total
Key Anchor Stores: Morrisons, Sainsbury's, Lidl. The centre comprises 88 additional national operators.	91
Community Facilities	
Library, Museum, Community Centre, Dental Surgery, Advice Centre (x2), churches/places of worship (x4)	10

Other Uses

In addition to the retail, commercial and leisure units identified above, there are a range of other complementary uses in the town centre help support its vitality by attracting visitors and driving footfall. These include several churches and places of worship, including Newport Congregational Church and St Thomas of Canterbury's Church on Pyle Street, the large library on Orchard Street, a dental surgery, community centre and numerous small offices. Church Litten Park to the south of the town centre provides an attractive area of open space.

Residential uses can also enhance the vitality to town centres through bringing activity throughout the day and helping to sustain small businesses. Due to the compact nature of the town centre and the low-rise built form, there are few residential uses in the upper floors of retail/commercial units, though we note there are several dwellings distributed throughout the centre with the majority being concentrated to the north along Crocker Street.

Accessibility

There has been little change regarding the accessibility in Newport since the previous study and the town centre continues to be accessible.
The bus station at South Street which provides services connecting to the rest of the island and there are bus stops present throughout the centre at St James Street, South Street, East Street and Carisbrooke Road.

The centre continues to be accessible by car, with several parks distributed throughout the centre including Morrisons, Sainsbury's, Co-op, Marks and Spencer and Chapel Street. On-street parking is also present along St James Street, Town Lane, High Street and Pyle Street.

Cycle parking continues to be available at a number of car parks and other points throughout the centre.

Environmental Quality

Newport's environmental quality is assessed to be good, having remained largely unchanged since 2019. There is evidence of good public realm at St Thomas Square and St James square and these areas continue to be attractive, comprising outdoor seating areas and planting schemes.
The quality of frontages along High Street continues to vary. Some of the frontages are modern and of high quality, others retain historical features which adds variety and interest, while others appear to be rather dated and in need of modernisation. Pedestrianisation of this road would help improve the environmental quality of the area and would help improve accessibility in this part of the town centre.

Pedestrian Flows

During our visits reasonable levels of pedestrian activity were observed within the retail core of the centre along central section of High Street. Pedestrian footfall was also observed towards the west of Pyle Street and along St James Street. Footfall was encouraged due to the concentration of retail banks and estate agents in these areas, as well as some key convenience retailers including Holland and Barrett, Central Convenience Store (High Street), Easy Weigh and Central Meats (Pyle Street).

Lower levels of pedestrian footfall were recorded towards the edges of the centre particularly around New Street and Crocker Street where there are a low number of retail units present. It was clear that social distancing restrictions and the changed working practices brought about by the coronavirus pandemic had some effect. This was apparent around Lugely Street, Town Lane and towards the south of St James Street where there are several leisure service units, particularly restaurants, cafes and takeaways which were observed to be quiet.

Retailer Requirements

In assessing the health of centres, it is also relevant to consider which retailer/leisure operators may be intending to seek representation in Newport Town Centre in the future. The Requirements List', sets out requirements for additional floorspace in particular town/city centres. As of March 2021, a total of 6 retail and commercial leisure operators are currently seeking premises in Newport:

- Co-op (minimum size. 185 sqm – maximum size. 929 sqm);
- The Hut (minimum size. 139 sqm – maximum size. 465 sqm);
- Hobbycraft (minimum size. 650 sqm – maximum size. 743 sqm);
- Snap Fitness (minimum size. 372 sqm – maximum size. 929 sqm);
- Papa Johns (minimum size. 79 sqm – maximum size. 139 sqm); and
- Busy Bees Day Nursery (minimum size. 372 sqm – maximum size. 650 sqm).

Despite the present economic climate, it is encouraging that there is still some demand from operators seeking premises in the town centre.

Commercial Rents

We have reviewed a range of online sources to obtain information on the strength of the rental market for commercial units within the Newport. Data available indicates that several commercial units were being actively marketed in March 2021. As expected, rents vary across the centre and they are generally more expensive within the primary shopping area than those to the edges of the centre.

Our search indicates that the average commercial rental value within Newport is around £218/sqm. The cheapest available unit is located at Holyrood Street and is available at £132/sqm. The most expensive unit in the centre is the former Phones 4 You unit at 50 High Street which attracts a rent of £315/sqm. This unit is located on the primary shopping frontage in the retail core of the town centre.

Digital Facilities

Presently, there are 4 BT Hotspot locations in Newport and 2 Sky-Cloud hotspots which provide some free Wi-Fi. These hotspots are provided by retailers and leisure service providers though and their coverage is likely to be limited. At the time of this assessment, there were Collect Plus locations or Amazon Lockers present within Newport, though it is likely that several retailers offer click and collect facilities. We consider that the absence of pick up points is poor for a centre of this size.

Balance between Independent and Multiple Stores

Of the 398 units within Newport town centre, 91 are occupied by multiple/national retailers (23% of the total units).
The sector with the highest proportion of multiple retailers is comparison retail with 52 out of 151 units (34%) occupied by multiples. These units are located throughout the centre boundary, though, the majority are situated within the retail core of the centre along High Street. Multiples present include B & M Bargains, WH Smith, Clintons, Boots, Next and H&M.

For convenience retail, 6 out of 24 units are occupied by multiple retailers (25%). These are located to the north and south of the centre and include Sainsbury's, Morrisons, Lids, Iceland, Holland & Barrett and Co-Operative Food. Retail and leisure services have the highest representation from independent occupiers. 11 out of 69 retail services (16%) are occupied by national retailers and only 12 out of 80 leisure services (15%).

Overall, we consider the proportion of independent traders across Newport to be positive as it helps to contribute to the character and individual offer of the town centre, helping to differentiate the offer from other centres in Newport and on the mainland.

Opening Hours Availability/Night-Time Economy

There are a wide range of operators within Newport town centre which operate at an array of hours ensuring that there is a good level of activity in the centre throughout the day and later hours. Most retailers in the centre operate between the core hours of 9-5.30 pm. The supermarkets within Newport operate longer hours including Sainsbury's (7am-9pm), Lidl (7am – 10pm), Morrisons (7-10pm) and Marks and Spencer (9am-7pm).

The night-time economy in Newport is considered to be reasonably good. Despite the proportion of leisure services being below the national average, the increased provision since the previous study has contributed to the decent night-time economy offer. The centre consists of a number of bars, social clubs, restaurants, public houses and fast food/take away units, all of which have opening hours which extend late into the evening.

Summary

Newport continues to be reasonably healthy centre displaying reasonable levels of vitality and viability. The centre is well represented by convenience and comparison goods providers and provides a strong financial & business service offer though leisure services remain under-represented. Despite the number of vacant units in the centre increasing, vacancy levels continue to remain below the national average. The centre provides a good balance of independent and multiple operators and a reasonably good night-time economy which has improved since 2018. Newport's level of accessibility and environmental quality remains unchanged since 2018. The level of digital facilities within the centre could be improved.

TETRA TECH Planning

Ryde Town Centre Health Check Assessment

2018 Health Check Findings

In 2018, Ryde Town Centre was found to:

- contain a good proportion of comparison goods units;
- provide a good level of retail and leisure service uses;
- have a low vacancy rate;
- benefit from good levels of accessibility; but
- have an environmental quality in need of improvement.

2021 Health Check Update

Diversity of Uses & Retailer Representation

There are currently 299 retail and commercial units in Ryde Town Centre, once less than in 2018. The number of convenience goods units in the town has decreased since 2018 (from 23 to 20) with the proportion of units in convenience goods use remaining comparable to the UK average. The centre continues to be anchored by the Co-Op foodstore which is the largest convenience retail unit (2,640 sqm) in Ryde followed by Iceland (710 sqm) and Sainsbury's Local (440 sqm). The majority of convenience goods units are occupied by independent operators (14). Considering the size and role of Ryde, the convenience offer is good, with a range of operators of different sizes to be found in the centre.

Despite a reduction of 12 comparison goods units, Ryde Town Centre continues to be very well represented for comparison retail with 111 units, some 37% of the total, well above the national average of 28%. Of those units in comparison goods use, the majority are occupied by gift shops, charity shops, clothing/footwear and antique stores.

The number of retail service units has marginally increased since 2018 and the sector continues to be dominated by hair/beauty salons which comprise over half of retail service provision. 15% of the units in the centre are occupied by retail service providers, just short of the national average of 16%.

Turning to leisure service provision in the town centre, there has been a slight reduction in the number of units (-3) since 2018 and the proportion of units occupied by leisure services in the centre is below the UK average (20% compared to 24%). The leisure service sector in the town centre now comprises predominantly fast food/take away units, public houses, restaurants, cafes and bars. The units are generally located to the central and northern sections of the centre.

Financial and business services account for 9% (26) of the centre's total units remaining the same as in 2018 and in line with other centres nationally. There continues to be a healthy number of banks and building societies represented in the town centre including HSBC, Natwest, Barclays, Lloyds, Nationwide Yorkshire Building Society and Barclays.

Being one of the larger centres in the Isle of Wight, Ryde Town Centre accommodates several other complementary uses which help to attract visitors and maintain footfall outside of core business hours. There include St Mary's Catholic Church on High Street, St John's Road School to the south of the centre, a chiropodist, a health centre and dentil surgery. In addition to these uses, there are also several small office buildings within the town centre and numerous dwellings which help bring activity and vibrancy.

Table 1: Diversity of Uses in Ryde Town Centre in January 2018

	Units		
	No.	**%**	**UK Average (%)**
Convenience	23	8	9
Comparison	123	41	31
Retail Service	45	15	14
Leisure Service	64	21	24
Financial and Business Service	26	9	10
Vacant	19	6	11
Total	**300**	**100**	**100**

Source: Experian Goad Surveys
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Ryde Centre in March 2020

	Units		
	No.	**%**	**UK Average (%)**
Convenience	20	7	9
Comparison	111	37	28
Retail Service	46	15	16
Leisure Service	61	20	24
Financial and Business Service	26	9	9
Vacant	35	12	13
Total	**299**	**100**	**100**

Source: Experian Goad Survey March 2020
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Ryde March 2020

National Operators	Total
Key Anchor Stores: Sainsbury's, Co-Op Other Multiple Operators: Boots, Wessex Cancer Trust, British Red Cross.	7
Community Facilities	
Place of worship (x4), kindergarten, community centre, health centre	7

Vacancies

There are 35 vacant units across Ryde, 12% of the total number of units. Though the vacancy rate is slightly below the national average of 13%, since 2018, the number of vacant units in the centre has increased significantly (+16 units). The largest vacant units in the centre are the former Esplanade Garage at 6-8 George Street (910 sqm), 12 Esplanade (420 sqm) and the former Auto check Car Repairs Garage at 93 High Street (300 sqm). Though vacant units are dispersed across the centre, there are concentrations within the south of High Street and at Esplanade.

Accessibility

The accessibility in Ryde remains largely unchanged since our 2018 survey. The centre benefits from a railway station which continues to provide services to Ryde Pier Head and Shanklin via Brading and Sandown, and the Ryde Bus Station located nearby provides connections across the island. There continues to be a good level of parking provision in the centre at St Thomas Street Car Park (approx. 200 spaces), St Thomas Lower (approx. 50 spaces), Co-Op (approx. 170 spaces) and Quay Road (approx. 247 spaces). Ryde also has a ferry service at Ryde Pier Head which provides services to Southampton.

Environmental Quality

The environmental quality throughout Ryde is generally good. Esplanade has a particularly attractive streetscape with evidence of public realm investment in the form of planting schemes, artistic street lighting, benches and litter bins. Additionally, there are a number of units along Esplanade with outdoor seating areas to take advantage of views facing the seas front. Along High Street and Union Street the shop fronts of the retail units are generally modern and inviting, though a small number of units are in need of refurbishment, to be consistent with the character of the street.

Pedestrian Flows

At the time of undertaking this health check assessment, despite the Covid-19 pandemic, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

In assessing the health of centres, it is also pertinent to consider which retailer/leisure operators may be intending to seek representation in Ryde town centre going forward. Following a review of 'The Requirements List', (data of March 2021) a total of 8 retail and commercial leisure operators are identified as currently seeking premises in the town centre. These are as follows:

- KFC (167 sqm – 325 sqm);
- Premier Inn (no floorspace requirement provided);
- Toolstation (260 sqm –557 sqm);
- Screwfix (279 sqm –1022 sqm);
- Aldi (929 sqm);
- Papa Johns (79 sqm –139 sqm);
- Lidl (1300 sqm –2,462 sqm); and
- Snap Fitness (372 sqm –929 sqm).

Commercial Rents

We have reviewed a range of online sources to obtain information on the strength of the rental market for commercial units within the Ryde. Data available indicates that eight commercial units were being actively marketed in March 2021. As expected, rents vary across the centre. Our search indicates that the average commercial rental value within Ryde is around £169/sqm. Interestingly, the cheapest unit being marketed (£113 per sqm) and most expensive unit (£198 sqm) are both located along High Street.

Digital High Street

There is a reasonable digital presence in the town centre. In terms of click and collect facilities, there are 2no. Collect Plus locations at Duffet Stores (12 John Street) and Greenhams (80 Union Street), though there are no Amazon Lockers in place. Turning to Wi-Fi provision, the centre comprises 1no. Sky Wi-Fi hotspot location at the Falcon Inn public house (17-18 Swanmore Road) and 1no. BT-WI-Fi hotspot location at HSBC (38 Union Street).

Opening Hours Availability/Night-Time Economy

The majority of operators along High Street and Union Street operate between the core business hours of 8.30-6pm, though public houses, bars and takeaway units typically operate at later hours. Coburgs (night club) along Union Street is open as late as 2pm. As with the other centres, convenience retailers operate at later hours including Co-op (6am-10pm) and Sainsbury's Local (8am-11pm).

Summary

Overall, we consider that Ryde Town Centre displays reasonable levels of vitality and viability. For its size, the centre provides a good offer across all sectors with the exception of leisure services, which we consider to be underrepresented. The centre provides an attractive environment, particular along Esplanade and also benefits from good levels of accessibility for all transport modes. Concerningly, since 2018, there has been a steep rise in the number of vacant units within the centre, and though this remains below the national average, opportunities should be investigated to seek to re-purpose these units.

TETRA TECH Planning

Cowes Town Centre Health Check Assessment

2018 Health Check Findings

In 2018, Cowes Town Centre was considered to:

- provide a strong comparison retail offer with a number of specialist and independent retailers present;
- have a declining financial and business service offer in need of some diversification
- contain a low vacancy rate;
- have a strong demand for national retailers seeking retail premises;
- provide a reasonably good environmental quality; and
- have a safe and relaxing shopping environment.

2021 Health Check Update

Diversity of Uses & Retailer Representation

Convenience goods provision in the town centre has improved since the 2018 study with the addition of 3 additional units. There are currently 15 convenience retail units in Cowes, 9% of the total units which is in line with the national average. The majority of the convenience retailers are concentrated within the central section of the survey area between Fountain Quay and Beckford Road. A further 2 units are situated to the north of the centre. The key multiple operators in the sector include Marks and Spencer (960 sqm) and Sainsbury's (600 sqm) which are also the largest units.

In contrast to convenience retail, there has been a decrease in the number of comparison goods units in the town centre, with a reduction in 9 providers since 2018. Despite this, the comparison retail offer remains relatively strong with the proportion of units (36%) being well above the national average (28%). The majority of the comparison units are occupied by independent operators. There are only 9 national retailers in the centre; Joules, Fat Face, NSPCC, RSPCA, Henri Lloyd, Helly Hansen, White Stuff, M&CO and TM Taylor. This is considered to be particularly positive as it differentiates the offer in Cowes from other centres on the island.

Table 1: Diversity of Uses in Cowes Town Centre in January 2018

	Units		
	No.	%	UK Average (%)
Convenience	12	8	9
Comparison	67	42	31
Retail Service	15	9	14
Leisure Service	44	28	24
Financial and Business Service	14	9	10
Vacant	7	4	11
Total	**159**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Cowes Town Centre in February 2019

	Units		
	No.	%	UK Average (%)
Convenience	15	9	9
Comparison	58	36	28
Retail Service	15	9	16
Leisure Service	41	26	24
Financial and Business Service	11	7	9
Vacant	19	12	13
Total	**159**	**100**	**100**

Source: Experian Goad Survey February 2019
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Cowes February 2019

National Operators	Total
Key Anchor Stores: Marks and Spencer's Simply Food, Sainsbury's. The centre comprises an additional 13 national operators.	15
Community Facilities	
Museum, Health Centre, Veterinary Surgery, Church	4

Leisure service provision in the town centre has also remained relatively stable since 2018 though there has been a minor decrease in the number of units from 44 to 41. The proportion of leisure service units (26%) compared to the total in Cowes remains above the UK average (24%), and comprises 9no. cafes, 8no. public houses, 7no. restaurants, 5no. takeaways, 5no. bars, 2no. social clubs and a betting office.

Turning to financial services, provision within Cowes continues to decline, with the loss of 3 additional units since 2018. Financial and business services only occupy 7% of the total in the centre which falls 2% below the national average. As with our findings in 2018, the offer comprises of only estate agents (x9) and financial advisors (x2) with no banking facilities in the centre.

The retail service provision in the centre has remained stable since 2018 with 15 units. Most of the units are occupied by hair and beauty uses though this offer is supplemented by other providers such as a Post Office, a travel agent, and an optician.

In addition to the retail and commercial uses identified above, the town centre also accommodates other uses which help to attract visitors. These include The Sir Atkin Max Museum, Cowes Methodist Church, a veterinary surgery and a health centre. The majority of dwellings in the town centre are located to the north of the survey area and within Middleton Terrace.

Vacancies

Cowes contains 19 vacant units, 12 more than the previous position in 2018. Vacant units occupy 12% of the total units which is just below the national average (13%). The majority of the vacant units are situated within the central and northern sections of the centre along High Street and Bath Road.

Accessibility

Cowes is relatively well connected with the level of accessibility remaining largely unchanged since our previous survey. Off-street parking is situated at Denmark Road, Cross Road and Bath Road and there is on-street parking provision along Birmingham Road. The centre is accessible by bus with stops located on Carvel Lane which provide bus services connecting to Northwood and Newport. To the east of the centre is the RedJet Ferry Terminal which provides approximately 4 ferry journey per day to Southampton on the mainland.

Environmental Quality

Cowes centre remains a clean, well-kept and attractive centre. There continues to be a good provision of street furniture throughout the centre including litter bins, wayfinding signage, benches and lights. Specifically, along Cross Street, Shooters Hill and High Street there is evidence of planting schemes and seating areas for visitors to enjoy. There is a varied treatment in the shopfronts along High Street, with some modern and some which are in need of refurbishing.

Pedestrian Flows

At the time of undertaking this health check assessment, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

Following a review of 'The Requirements List', this identifies (data of March 2021) that there is only one retail operator seeking premises within Cowes. The operator is The Works which has a minimum requirement of 139 sqm and a maximum requirement of 186 sqm. It is noteworthy that The Works were identified as having a requirement in the previous study perhaps indicating that there is a lack of suitable retail space within the centre.

Commercial Rents

At the time of writing no commercial rental data for Cowes is available.

Digital High Street

The town centre has recently benefited from the introduction of a dedicated website (https://cowestowncentral.co.uk/) which provides information of the commercial/shopping facilities and retail offering within Cowes. The website is modern, easy to use and provides information and contact details for town centre services/retailers.

There is a lack of Wi-Fi provision within the centre. Cowes Town Centre only has 1 BT Hotspot location located at Marks and Spencer (Terminus Road) and 1 Sky Cloud hotspot at The Fountain Public House. Furthermore, Cowes has does not provide any independent click and collect facilities such as Amazon Lockers or Collect + points..

Opening Hours Availability/Night-Time Economy

Opening hours for retailers within Cowes is generally between 9am and 5pm Monday to Saturday, with the exception of some retail units opening half an hour earlier or later. For the larger retailers, the opening hours tend to be for much longer including: Marks and Spencer 8.30-8pm, Sainsburys 7am-10pm.

Cowes has a reasonable evening/night-time economy, with a number of public houses, bars and restaurants open towards the later hours. The evening/night-time economy is primarily concentrated on Shooters Hill and High Street.

Summary

Cowes is a relatively healthy centre with, for its size, a relatively strong representation from the comparison goods, convenience and leisure service sectors. The streetscape in Cowes is attractive with good quality street furniture which helps create a pleasant environment. The level of accessibility in Cowes is similar to the position in 2018. However, since the previous survey there has been an increase in vacancy levels.

TETRA TECH Planning

Freshwater Town Centre Health Check Assessment

2018 Health Check Findings

The 2018 health check found that Freshwater Town Centre:

- contained a convenience and comparison goods offer in line with the national average;
- provided a strong financial and business service offer;
- had a comparatively high vacancy rate with a cluster of units along School Green Road; and
- had an environmental quality which could be improved with several shopfronts in particular in a poor condition.

2021 Health Check Update

Diversity of Uses & Retailer Representation

There are currently 64 retail and commercial units within Freshwater Town Centre, a decrease of 3 units since our last review in 2018.
The convenience goods offer in Freshwater has strengthened since 2018 and there are now 7 units in the town centre occupying 11% of the total, a proportion which is 2% above the national average. The largest units are the Sainsbury's Local (520 sqm) and Co-Operative Food (220 sqm) which are the only multiple convenience retailers, with the others operated by independents.

In terms of comparison goods, there are currently 18 units in Freshwater (28% of the total). Despite there being a reduction of 3 units since 2018, comparison goods provision within the centre remains comparable to the national average. As with the convenience goods, the majority of comparison goods units are occupied by independent retailers, reflecting the centre's more local focus.

Turning to retail services, provision within Freshwater has seen a small reduction from 10 to 9 units since 2018. Retail service providers occupy 14% of the overall units in the centre which is slightly below the national average. There is a cluster of retail services to the west of the centre along Avenue Road and along Moa Place. The majority of service providers are hairdressers and beauty salons, though there are other uses including a funeral provider run by Co-op funeral care.

The financial and business service sector has weakened, with the loss of Lloyds Bank. There are now 8 financial and business service providers in Freshwater (13% of all units), though this is still above the national average. Five of the units are occupied by estate agencies with the other units providing law services, an employment agency and a financial advisor.

Leisure service provision has improved in Freshwater since 2018 and there are now 12 units in leisure use which are predominantly occupied by cafes and fast food take-aways. Leisure services continue to primarily be provided along School Green Road and to the east of Avenue Road.

In addition to retail and commercial units referenced above, there are several other uses within the town centre which help to drive footfall and bring further activity. These include a community centre and Parish Council building, several medical and dental practices and Freshwater Methodist Church. Due to the compact nature and low-rise form of the centre, there are not many residential uses above commercial units, though there are several dwellings scattered throughout the east of the centre and a short walk from the centre.

Table 1: Diversity of Uses in Freshwater Town Centre in January 2018

	Units		
	No.	%	UK Average (%)
Convenience	6	9	9
Comparison	21	31	31
Retail Service	10	15	14
Leisure Service	10	15	24
Financial and Business Service	9	13	10
Vacant	11	16	11
Total	**67**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Freshwater Town Centre in February 2019

	Units		
	No.	%	UK Average (%)
Convenience	7	11	9
Comparison	18	28	28
Retail Service	9	14	16
Leisure Service	12	19	24
Financial and Business Service	8	13	9
Vacant	10	16	13
Total	**64**	**100**	**100**

Source: Experian Goad Survey February 2019
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Freshwater February 2019

National Operators	Total
Key Anchor Stores: Sainsbury's, Co-Op Other Multiple Operators: Boots, Wessex Cancer Trust, British Red Cross.	7
Community Facilities	
Health Centre, Community Centre, Council Building, Library, Church, Dentist (x2), Chiropodist	8

Vacancies

Freshwater contains 10 vacant units, 16% of the total number of units in the centre. Despite a reduction in 1 vacant unit since 2018, the vacancy rate continues to be above the national average. We note that several units have remained vacant since 2018, including 15 School Green Road (the largest vacant unit at 410 sqm) and a cluster of units to the west of School Green Road on its northern side. The most notable unit to be been vacated since 2018 is the former Lloyds Bank on the corner of Tennyson Road.

Accessibility

Accessibility remains largely unchanged since 2018. The town centre provides a reasonable level of car parking provision with on-street parking spaces along Avenue Road and car parks at Moa Place and Avenue Road. Bus stops are located along Avenue Road, School Green Road and Tennyson which serve the no. 7 and 12 bus services which lead to destinations such as, Alum Bay, Totland and Newport.

Environmental Quality

The environmental quality in Freshwater is in need of some improvement. Along School Green Road the pedestrian environment is relatively attractive. Along Avenue Road, there is evidence of new paving on the western side of the road, however, there are a variety of shop front treatments. The majority of units which are in need of modernisation, though units such as Beauty Box, Jills Kitchen, Vectis Vapes and Cassies Corner have seen investment and greatly improve the environment. The centre would also benefit from investment into street furniture, including bins, seating areas and bus shelters.

Pedestrian Flows

At the time of undertaking this health check assessment, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

'The Requirements List' indicates that there is currently a requirement (at March 2021) from Screwfix for a presence in Freshwater for a premises with the minimum size of 279 sqm and a maximum size of 1021 sqm. We are not aware of any other requirements.

Commercial Rents

At the time of writing no commercial rental data is currently available for commercial property Freshwater.

Digital High Street

There is a particularly weak digital presence in Freshwater. The centre has no Wi-Fi or click and collect facilities present and the shopping provision does not have any online coverage.

Opening Hours Availability/Night-Time Economy

The operating hours for the retailers within Freshwater are generally between 9am -5pm. The foodstores within the centre are open longer hours with the Sainsbury's Local open between 7.00am-9.00pm and Co-Op operates between 8.00am – 10.030pm. Leisure services in the centre provide a night-time economy in Freshwater. The majority of leisure services are open beyond 9pm. West Wight Social Club is open until 9.15pm, The Vine Inn opens until 10pm and there are takeaways including Fatima which open later into the evening.

Summary

Freshwater demonstrates reasonable levels of vitality and viability, though several areas are in need of improvement. The centre has seen a slight contraction in its comparison goods offer and its leisure service provision remains below average. There are now fewer vacant units than 2018 but the vacancy rate is still above the national average. We consider that additional investment into the public realm is required to ensure it continues to attract shoppers/visitors and allow the centre compete more effectively going forward.

Shanklin Town Centre Health Check Assessment

2018 Health Check Findings

In 2018, Shanklin Town Centre was considered to:

- have a good comparison goods and retail service offer (for its size);
- contain a below average provision of convenience, leisure and financial and business service uses;
- provide a good level environmental quality; and
- contain a vacancy rate in line with the national average.

2021 Health Check Update

Diversity of Uses & Retailer Representation

There are 181 commercial and retail units in Shanklin Town Centre, which is broadly in line with the number of units surveyed in 2018.
The convenience goods offer in Shanklin has increased by 2 units since 2018 and there are now 14 convenience goods units in the centre, (8% of the total) a proportion broadly in line with other centres nationally. Of the convenience units, only the two Co-op stores and Spar are run by national/multiple operators. We note the presence of the large Morrisons foodstore to the north east of the town which further adds to the convenience offer within the town, albeit in an out-of-centre location.

There is a good comparison goods representation in Shanklin with a total of 68 units across the town centre (38% of the total). Despite the number of units decreasing since 2018, the proportion of comparison goods units in the centre remains above the UK average (38% vs the national average of 28%). Most of the units are occupied by local/independent retailers but multiples present in the centre include Poundland, Toymaster, Boots and Shoezone.

The largest comparison goods units in the town centre are occupied by national multiples, the largest of which is Poundland at 590sq m. Half of the comparison goods units in the centre are relatively small in size at 100 sqm or below.

There are 27 retail service units across the town centre, a small decrease since the last survey was undertaken in 2018. The proportion of units in retail service use is in line with the national average (15%). The majority of the retail service providers in the town centre fall within the 'health & beauty category', 12 units are occupied by hairdressers and 3 units by beauty salons. Other retail providers across the centre include 2 travel agents, 2 natural therapy units, an optician, launderette, tattooist, dog groomer, undertakers, wedding services, post office and clothing hire. Overall, we consider the retail service provision in Shanklin to be commensurate to the centres' size and role.

Though the number of leisure services in Shanklin has risen since 2018, the provision is still below the national average (21% of units vs the national average of 24%). Leisure providers in the town include The Pot snooker club and the Vernon Cottage public house, as well as several takeaway units, restaurants, cafes and bars. These leisure units are mainly distributed to the south of the town centre.

Financial and business services account for 6% (10) of the centre's total units which is one less than the previous study due to the loss of Island Auction Rooms (79-81 Regent Street), this is 3% below the national average. The only bank in the centre is Lloyds with the majority of financial business service units are occupied by Estate Agents.

Table 1: Diversity of Uses in Shanklin Town Centre in January 2018

	Units		
	No.	**%**	**UK Average (%)**
Convenience	12	7	9
Comparison	72	40	31
Retail Service	28	16	14
Leisure Service	36	20	24
Financial and Business Service	11	6	10
Vacant	20	11	11
Total	**179**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Shanklin Town Centre in February 2019

	Units		
	No.	**%**	**UK Average (%)**
Convenience	14	8	9
Comparison	68	38	28
Retail Service	27	15	16
Leisure Service	38	21	24
Financial and Business Service	10	6	9
Vacant	24	13	13
Total	**181**	**100**	**100**

Source: Experian Goad Survey March 2020
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Shanklin February 2019

National Operators	Total
Key Anchor Stores: Co-Op Other Multiple Operators: Spar, Shoe Zone, British Red Cross, British Heart Foundation, Boots, Peacocks, Poundland, Hays, Domino's, Lloyds, Nationwide.	12
Community Facilities	
Health Centre, place of worship (x3), library	5

Vacancies

There are 24 vacant units across Shanklin Town Centre, a proportion equal to the national average (13% of the total number of units). These vacant units are concentrated to the central and southern section of the centre and lie predominantly along High Street. Vacancies have risen since 2018, the centre has gained another 4 vacant units, including the former Age UK, Nathalie Clare and Beauty Lounge (all on High Street) and the former Babyshka book shop on Carter Road.

Accessibility

For a town centre of its size, Shanklin is considered to be reasonably accessible for all transport modes. The centre comprises, a good provision off-street car parking with four large car parks present. The centre benefits from a train station providing services to Ryde Pier Head and Ryde St Johns Road and bus stops are located along High Street and Regent Street which connect services to Ryde, Ventnor and Newport.

Environmental Quality

The centre provides a high-quality environment with the majority of shop fronts appearing well-maintained with evidence of investment as result of new uses occupying existing units. The streets appear to be clean and safe and there is little evidence of litter and vandalism. However, a number of the vacant units do detract from the appearance of parts of the centre.

Pedestrian Flows

At the time of undertaking this health check assessment, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

In assessing the health of centres, it is also pertinent to consider which retailer/leisure operators may be intending to seek representation in Shanklin town centre going forward. Following a review of 'The Requirements List', (data of March 2021) a total of 3 retail and commercial leisure operators are identified as currently seeking premises in Shanklin:

- Screwfix (minimum size. 279 sqm – maximum size. 1,022 sqm);
- Aldi (size. 929 sqm); and
- The Works (minimum size. 139 sqm – maximum size. 185 sqm);

We note that The Works also required premises in Shanklin at the time of the 2018 study indicating a potential lack of suitable sites in the centre.

Commercial Rents

There currently is no commercial rental data available for Shanklin.

Digital High Street

Developing a 'bricks & clicks' environment can benefit a town/city centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising.

There are presently two Sky hotspot locations providing covering of free Wi-Fi across the town centre and one Collect+ click and collect facility. Given the size of the centre, it is considered that the digital offering could be improved with further free Wi-Fi hotspots and parcel collection services.

Opening Hours Availability/Night-Time Economy

With the exception of the large foodstores and leisure service providers, the majority of operators in Shanklin town centre operate between the core hours of 8.30am – 5.30pm. Co-op opens from 7am – 10pm daily (except for Sundays), while the Spar to the south of the town centre opens from 8am – 11pm daily. The leisure service providers across the town centre also operate later opening hours which helps to with the majority of restaurants and take aways being open until 10pm. Shanklin also accommodates a Conservative Club which opens between 11am-11pm Monday to Sunday and 3no. public houses which close between 8pm-11pm. Whilst the provision of these units are low, the night-time economy officer is considered adequate within Shanklin.

Summary

Generally, Shanklin is a healthy centre and, for its size, provides a good representation of retail and services. However, the financial and business service offer and leisure provision could be improved with these sectors being underprovided for. We note that the vacancy rate in Shanklin has increased since 2018 but it is comparable with the national average. The environmental quality also continues to be of high quality and the centre benefits from good levels of accessibility.

TETRA TECH Planning

Sandown Town Centre Health Check Assessment

2018 Health Check Findings

In 2018, Sandown Town Centre was found to:

- have a good comparison goods and leisure service offer;
- be underprovided for in terms of retail service and financial and business service provision;
- benefit from a low and stable vacancy rate; and
- have a varied environmental quality which could benefit from some improvement.

2021 Health Check Update

Diversity of Uses & Retailer Representation

There are currently 116 retail and commercial units within Sandown Town Centre,

Since 2018, the convenience retail offer in Sandown has remained unchanged and there continues to be 6 retailers in the town centre, 5% of total number of units. When compared to other centres nationally, the provision is significantly below average though we note the presence of several larger foodstores in the nearby town of Shanklin which meet the needs of local shoppers.

There are currently 34 units occupied by comparison goods retailers in Sandown, 29% of the town centre's units. Despite a decrease in comparison goods retailers since 2018 the proportion of comparison goods units remains comparable to the national average (28%). Overall, 9 units have been lost from the centre including Pebble Gift Shop, 2 newsagents, and several charity shops.

Despite several leisure service providers being lost from the centre since 2018, Sandown continues to provide a good range of leisure services. In total there are 38 units in the centre, 33% of the total units which is above the national average of 24%. Reflecting the tourism focus of the town, there are 9 hotels across the centre and 7 restaurants. Other providers include 5 takeaway units and 4 bars.

Though retail service provision has increased since 2018, the proportion of units in such use is still only half of the national average.. 6 of the retail service units are occupied by hairdressers with the other providers comprising a launderette, travel agent and post office.

Financial and business service provision has strengthened since 2018 but still remains below the national average. There are 3 estate agencies and 2 solicitors within the centre but no banking facilities, since the closure of Lloyds on High Street. The limited financial and business service provision in the centre is perhaps reflective of the town's tourism focus and the strength in provision within the nearby Shanklin.

Table 1: Diversity of Uses in Sandown Town Centre in January 2018

	Units		
	No.	%	UK Average (%)
Convenience	6	5	9
Comparison	43	37	31
Retail Service	8	7	14
Leisure Service	45	39	24
Financial and Business Service	6	5	10
Vacant	7	6	11
Total	**115**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Sandown Town Centre in February 2019

	Units		
	No.	%	UK Average (%)
Convenience	6	5	9
Comparison	34	29	28
Retail Service	9	8	16
Leisure Service	38	33	24
Financial and Business Service	7	6	9
Vacant	22	19	13
Total	**116**	**100**	**100**

Source: Experian Goad Survey February 2019
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Sandown February 2019

National Operators	Total
Key Anchor Stores: Sainsbury's Local Other Multiple Operators: Boots, RSPCA, The Watch Shop, Ladbrokes, Betfred.	6
Community Facilities	
library	1

Vacancies

There are 22 vacant units within Sandown Town Centre, 19% of the total. The vacancy rate is considerably higher than the national average where around 13% of units across a typical centre would be vacant. When compared with 2018, the number of vacancies has increased by 15 units with key closures including the Co-Op (420 sqm) and Lloyds Bank (190 sqm), both located along High St.

Accessibility

Accessibility within the town centre remain similar to the 2018 position. There continues to be reasonable parking provision in the centre with two main off-street car parks at Station Avenue and St Johns Road. In terms of public transport, there are bus stops at Victoria Road, High Street and Melville Street serving bus routes to destinations such as Ventnor, Newport and Ryde.

Environmental Quality

The environmental quality in Sandown has declined slightly since the previous study, with the increase in vacancies leaving several buildings characterless and somewhat derelict, detracting from the appearance of the area. Along High Street there is a mixture of shop front treatments, with evidence of some modern fascia signage and some rather dated. The environment to the south-west of the centre, particularly along Esplanade and Pier Street is predominantly high in quality, comprising a number of planting schemes and outdoor seating areas to encourage visitors to take advantage of the seafront views.

Pedestrian Flows

At the time of undertaking this health check assessment, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

There are currently no requirements from operators for any retail or commercial premises in Sandown.

Commercial Rents

There is currently no data available relating to rents on commercial property in Sandown.

Digital High Street

There is only one Wi-Fi hotspot available in Sandown, a Sky hotspot location at The Sands Hotel and only a single collection facility (Collect Plus) at P&J news representing an under-provision of facilities in the centre.

Opening Hours Availability/Night-Time Economy

The majority of operators along High Street operate between core business hours of 8.30am – 5.30pm, though public houses, bars, restaurants and takeaway units typically will operate later hours into the evening. Sainsburys Local being the main convenience store opens between 8am-10pm.

Summary

Overall, Sandown Town Centre displays variable characteristics of a viable centre. Though the comparison goods and leisure service sectors remain strong, the centre is under-represented by retail service providers and convenience retailers. The vacancy rate has also increased, and the centre now comprises several unoccupied units which contribute to some areas providing a relatively poor-level of environmental quality. The level of accessibility remains reasonable and largely unchanged since the previous study.

East Cowes Town Centre Health Check Assessment

2018 Health Check Findings

In 2018, East Cowes Town Centre was considered to:

- have an improved retail provision following the opening of a new Waitrose store;
- have a vacancy rate proportional to the national average;
- suffer from a lack of available car parking;
- provide a reasonably good environmental quality; and
- have a safe and relaxing shopping environment.

2021 Health Check Update

Diversity of Uses & Retailer Representation

East Cowes accommodates 49 retail units, a decrease in 3 units since 2018. The centre is well provided for by convenience retailers with a Waitrose supermarket and Co-Op foodstore helping to anchor the centre. In total there are 5 convenience units in East Cowes, 10% of the total number which is slightly above the national average of 9%. The convenience units vary in size, the largest is Waitrose (2,310 sqm) situated to the north of the centre and the smallest is vape shop Darth Vaper at 50 sqm.

Retail service provision in East Cowes remains unchanged since 2018, with 24% of units in the centre in such use, 8% above the national average. The retail service provision comprises 4no. hairdressers, 2no. tattooists, a post office, a launderette, a beauty salon, a vehicle repairs garage, undertakers and a photo studio.

The number of leisure services has decreased slightly since 2018 and there are now 11 leisure units in the centre (22% of all units). This provision falls slightly below the national average of 24%. The majority of leisure services are restaurants, fast food take-away units and cafes with only one public house in the centre.
The centre has also seen a slight decrease in the number of comparison goods units since 2018. The proportion of units in comparison use is now 4% below the national average (28%). Due to the centre’s local role we do not consider this to be of concern. The majority of the units are small-scale and are mostly occupied by independent retailers with Age UK and Lloyds Pharmacy being the only multiple operators in the sector.

The financial and business service provision continues to be below the national average and remains unchanged since the previous study, with three estate agencies. As before, there are no dedicated banking facilities in the centre

Table 1: Diversity of Uses in East Cowes Town Centre in January 2018

	Units		
	No.	%	UK Average (%)
Convenience	6	12	9
Comparison	13	25	31
Retail Service	12	24	14
Leisure Service	12	24	24
Financial and Business Service	3	6	10
Vacant	5	10	11
Total	**51**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in East Cowes Town Centre in March 2020

	Units		
	No.	%	UK Average (%)
Convenience	5	10	9
Comparison	12	24	28
Retail Service	12	24	16
Leisure Service	11	22	24
Financial and Business Service	3	6	9
Vacant	6	12	13
Total	**49**	**100**	**100**

Source: Experian Goad Survey March 2020
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in East Cowes March 2020

National Operators	Total
Key Anchor Stores: Waitrose, Co-Op	2
Community Facilities	
Museum, Health Centre, Council Office, Library, Dentist (x2), Chiropodist	7

Vacancies

The number of vacant units in East Cowes has increased slightly from 2018 (5 to 6 units) though the proportion of vacant units in the centre remains well below the national average. The largest vacant unit in the centre is the former Sweet Memories at no. 15 York Avenue.

Accessibility

The accessibility within East Cowes is satisfactory and remains unchanged since our 2018 survey. The centre is relatively compact and provides good access for pedestrians. Along Dover Road, Link Road and York Avenue, there are bus stops which provide services to Ryde and Newport. There continues to be a lack of car parking within the centre which may put off some visitors to the town. To the west of the centre is the East Cowes Ferry Terminal which provides approximately 7 ferry journey per day to Southampton.

Environmental Quality

East Cowes continues to provide a clean and well-maintained environment. Clarence Road, Castle Street and York Avenue are attractive pedestrian environments with modern shopfronts and fascia signs, particularly the Co-op. To the front of the Waitrose supermarket there is an aesthetically pleasing section of public realm comprising seating, tree planting and new paving. Along York avenue the retail units face each other and comprise active frontages which creates a good level of natural surveillance. There appears to be little evidence of litter or vandalism which adds to the feeling of safety and security.

Pedestrian Flows

At the time of undertaking this health check assessment, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

As with the previous study, a review of 'The Requirements List' (March 2021) indicates that there are currently no retail operators with requirements for premises in East Cowes.

Commercial Rents

At the time of writing no commercial rental data is currently available on commercial property in East Cowes.

Digital High Street

East Cowes continues to have a poor presence online with no website referencing the shopping provision in the locality and we note that the centre also lacks any click and collect facilities. In terms of Wi-Fi coverage, there is only 1 Sky Wi-Fi hotspot situated at East Cowes Liberal Club (17 York Avenue) and no BT Wi-Fi hotspot locations.

Opening Hours Availability/Night-Time Economy

There are a range of opening hours amongst the retailers present in East Cowes. Regarding convenience retailers, Co-Op opens between 7am – 10pm and Waitrose opens between 8am-8pm. However, the majority of retailers within the centre generally operate between 9am - 5.00pm. East Cowes has a limited night-time economy offer with only a small number of leisure service units. These include Taste of India restaurant and Ship and Castle pub which open until 10pm and East Cowes Conservative Club which opens from 5pm-11.30pm on some days.

Summary

East Cowes continues to provide for local needs and displays reasonable levels of vitality and viability. The centre provides a good range of convenience goods and retail services, but its financial and business service provision remains relatively poor. Though the provision of comparison goods units falls below the national average, we consider that the present offer is appropriate for its size and role of the centre. There is good representation by independent operators and the centre provides a reasonably clean and attractive environment. Since 2018, the vacancy rate within East Cowes has marginally increased but remains below the national average.

Ventnor Town Centre Health Check Assessment

2018 Health Check Findings

Our 2018 health check found that Ventnor:

- Accommodated a mix of retail outlets serving both a local need and the tourist market;
- had a good provision of leisure services;
- provided a limited financial and business service offer;
- had a generally good environmental quality;
- felt safe; and
- had a higher than average vacancy rate

2021 Health Check Update

Diversity of Uses & Retailer Representation

Ventnor Town Centre accommodates 90 retail/commercial units, a broadly similar number of units that was recorded in 2018. Convenience goods provision in the town centre has improved since 2018, and there are now 10 convenience goods retailers in Ventnor. The largest units are occupied by the Co-Op (650sq m) and by Tesco Express (220sq m), these are the only multiple operators in this sector. The other units occupied by independents are typically small in size.

The town centre has seen a slight decrease in the number of comparison goods units, with one fewer now than there was in 2018. Despite this, there continues to be a high representation of comparison units in the centre (36% of units), above the national average. The bulk of comparison goods units are situated to the western section of the centre along Church Street and the west of High Street.

Retail service provision remains as it was in 2018 with 10 units across the centre. When compared to the national average, the proportion of retail service units in the centre is well below average (11% vs 16%) which indicates an under-representation. The majority of retail services continue to be occupied by hairdressers though other uses include a post office, a tattooist, an optician, a beauty salon and a launderette. We consider this to be a good range considering the size and role of the centre.

Ventnor's leisure service provision has remained relatively stable since 2018, with a marginal decrease (-1) in the number of units. The centre provides a good range of pubs/restaurants/cafes and is a popular eating out and drinking destination. The Rose Inn is the sole public house in the centre and another important leisure facility is the Ventnor Exchange theatre which also includes a bar and recording studio which attract visitors. Despite the popularity of Ventnor as a leisure destination, the proportion of leisure service units within the centre is slightly below the national average (23% of the total number vs the national average of 24%).

The financial and business service provision in Ventnor remains unchanged since 2018 and the proportion of financial and business service units continues to be below the national average (6% vs the national average of 9%). Reflecting the tourism focus of the centre, all units in financial and business service use are occupied by estate agencies. The nearest dedicated banking facilities are in Shanklin.

Aside from the commercial and retail uses outlined above, Ventnor Town Centre accommodates several other uses which serve the local community and help to attract visitors. These include St Catherine's Church (11 Church Street) and Ventnor Baptist Church (Pier Street), the Ventnor Heritage Museum (11 Spring Hill) and Ventnor Medical Centre, and a chiropractor.

Table 1: Diversity of Uses in Ventnor Town Centre in January 2018

	Units		
	No.	%	UK Average (%)
Convenience	8	9	9
Comparison	33	36	31
Retail Service	10	11	14
Leisure Service	22	24	24
Financial and Business Service	5	5	10
Vacant	14	15	11
Total	**92**	**100**	**100**

Source: Experian Goad & WYG Survey
UK average from the Experian Goad Category Report (December 2017)

Table 2: Diversity of Uses in Ventnor Town Centre in February 2019

	Units		
	No.	%	UK Average (%)
Convenience	10	11	9
Comparison	32	36	28
Retail Service	10	11	16
Leisure Service	21	23	24
Financial and Business Service	5	6	9
Vacant	12	13	13
Total	**90**	**100**	**100**

Source: Experian Goad Survey March 2020
UK average from the Experian Goad Category Report (November 2020)

Table 3: Units in Freshwater February 2019

National Operators	Total
Key Anchor Stores: Co-operative Food, Tesco Express Other Multiple Operators: Boots, RSPCA, Post Office.	5
Community Facilities	
Chiropractor, Museum, Medical Centre, Place of worship (x2)	5

Vacancies

The number of vacant units in the town centre has reduced since 2018 (from 14 to 12 units). The proportion of vacant units in the centre is now in line with the national average.

Accessibility

Accessibility by different modes of transport in Ventnor has remained as it was at the time of the last study in 2018. Car parking provision remains limited with continued reliance on the main central car park off High street and some on-street parking provision along High Street. The centre is accessible by bus, with stops located on High Street and Spring Hill serving buses which run towards to Ryde, Shanklin, Sandown and Newport. Whilst some cycle parking is available, it remains underused

Environmental Quality

The town centre continues to provide a good quality environment. The public realm is attractive with planting schemes and street furniture, particularly around Spring Hill. Whilst the majority of shopfront are well maintained, some of which retain their original Victorian shopfronts, there are a number that would benefit from improvement and the warehouse unit to the east of The Ros Inn pub is in need to investment as it detracts from the appearance of the centre. Overall, the centre comprises a clean environment and there continues to be little evidence of litter and graffiti.

Pedestrian Flows

At the time of undertaking this health check assessment, the town centre was under lockdown as a result of the Covid-19 pandemic. Thus, observations on footfall were not possible.

Retailer Requirements

There are presently (March 2021) no retail or commercial operators identified with requirements for a premises in Ventnor.

Commercial Rents

At the time of writing no commercial rental data was available for commercial or retail property in Ventnor.

Digital High Street

In terms to free Wi-Fi provision, the offer could be improved as there is only free Wi-Fi hotspot location (at the Rose Inn public house on Pier Street). The presence of click and collect facilities in the centre is reasonably good with an Amazon Locker and a Collect Plus facility at the U-Save supermarket on High Street.

Opening Hours Availability/Night-Time Economy

The majority of retailers within the town centre generally operate between 9am -5.30pm though the foodstore and convenience operators generally operate longer hours. The Co-op Food store open between 07.00-22.00 Monday to Saturday and the Tesco Express open from 7.00-23.00 Monday to Saturday.

In terms of evening/night-time economy, the town centre provides 1 public house, 6 bars/pubs, 2 takeaway outlets, 10 restaurants/cafes and a cinema. Overall and for its size, this offer is considered to be reasonable, though parts of the centre away from these uses may suffer from a lack of activity in the evening.

Summary

Ventnor continues to be a vital and viable centre, providing a mixture of retail units to serve the need of both local residents and visitors. Retail and financial and business service provision continue be limited with no banks or building societies provided.. The vacancy rate has improved and is in line with the national average. There remains a reasonably high-quality environment within Ventnor, particularly along Spring Hill and the centre appears safe. Finally, the night-time/evening economy is also considered to be good.

Appendix B

Population & Retail Expenditure
Statistical Tables

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 1: Population Growth, by Zone

Zone	2021	2023	2028	2031	2034	Change 2021-2023		Change 2021-2028		Change 2021-2031		Change 2021-2034	
						No.	%	No.	%	No.	%	No.	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]
1	55,905	56,484	57,808	58,560	59,269	579	1.0	1,903	3.4	2,655	4.7	3,364	6.0
2	38,212	38,635	39,478	39,958	40,361	423	1.1	1,266	3.3	1,746	4.6	2,149	5.6
3	26,414	26,681	27,334	27,659	27,907	267	1.0	920	3.5	1,245	4.7	1,493	5.7
4	13,245	13,420	13,844	14,043	14,195	175	1.3	599	4.5	798	6.0	950	7.2
5	11,102	11,214	11,523	11,629	11,684	112	1.0	421	3.8	527	4.7	582	5.2
Total	**144,878**	**146,434**	**149,987**	**151,849**	**153,416**	**1,556**	**1.1**	**5,109**	**3.5**	**4,670**	**3.2**	**8,538**	**5.9**

Notes:
[1], [2], [3], [4], [5] Population figures taken from Experian Retail Planner Area Profile Report for each zone (2011 Census)
[6] = [2] - [1]
[7] = [6] / [1]
[8] = [3] - [1]
[9] = [8] / [1]
[10] = [4] - [1]
[11] = [10] / [1]
[12] = [5] - [1]
[13] = [11] / [1]

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 2: Per Capita Convenience Goods Expenditure, by Zone (£)

Zone	2021	2023	2028	2031	2034
1	2,313	2,167	2,148	2,139	2,137
2	2,379	2,229	2,210	2,200	2,198
3	2,237	2,096	2,078	2,069	2,067
4	2,454	2,299	2,279	2,270	2,267
5	2,471	2,315	2,295	2,286	2,283

Notes
Per capita expenditure derived from Experian MMG3 data (March 2021)
Per capita expenditure projected forward using forecast growth rates taken from Experian Retail Planner Briefing Note 18 (October 2020)
Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 18 (October 2020)

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 3: Total Available Convenience Expenditure, by Zone (£m)

Zone	2021	2023	2028	2031	2034	Change 2021-23		Change 2021-28		Change 2021-31		Change 2021-34	
						No.	%	No.	%	No.	%	No.	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]
1	129.3	122.4	124.2	125.3	126.6	-6.9	-5.3	-5.1	-4.0	-4.0	-3.1	-2.7	-2.0
2	90.9	86.1	87.2	87.9	88.7	-4.8	-5.3	-3.7	-4.0	-3.0	-3.3	-2.2	-2.4
3	59.1	55.9	56.8	57.2	57.7	-3.2	-5.4	-2.3	-3.9	-1.9	-3.1	-1.4	-2.4
4	32.5	30.9	31.6	31.9	32.2	-1.6	-5.1	-0.9	-2.9	-0.6	-1.9	-0.3	-1.0
5	27.4	26.0	26.4	26.6	26.7	-1.5	-5.4	-1.0	-3.6	-0.9	-3.1	-0.8	-2.8
Total	**339.2**	**321.2**	**326.2**	**328.9**	**331.9**	**-18.0**	**-5.3**	**-13.0**	**-3.8**	**-10.3**	**-3.0**	**-7.3**	**-2.2**

Notes
[1] to [4] Calculated by multiplying population (Table 1) by per capita convenience goods expenditure (Table 2)
[5] = [2] - [1]
[6] = [2] / [1]
[7] = [3] - [1]
[8] = [3] / [1]
[9] = [4] - [1]
[10] = [4] / [1]

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 4a - Per Capita Comparison Goods Expenditure, by Category, 2021 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1	731	218	143	199	96	450	333	72	310	158	195	2,905
2	762	230	160	208	101	475	328	90	324	171	222	3,070
3	700	203	140	187	92	438	305	88	297	153	196	2,800
4	742	240	153	219	127	481	329	108	309	197	214	3,119
5	765	236	156	221	122	492	316	129	299	202	221	3,160

Table 4b - Per Capita Comparison Goods Expenditure, by Category, 2023 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1	793	237	155	217	105	489	361	78	336	171	212	3,154
2	827	250	173	225	110	516	356	98	351	186	241	3,333
3	759	221	152	204	100	475	331	95	323	166	213	3,040
4	805	261	166	238	138	522	357	118	336	213	233	3,386
5	831	256	169	240	133	534	343	140	324	219	240	3,430

Table 4c: Per Capita Comparison Goods Expenditure, by Category, 2028 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1	884	264	173	242	117	545	403	87	375	191	236	3,517
2	922	278	193	251	122	575	397	109	392	207	269	3,717
3	847	246	170	227	111	530	369	106	360	185	238	3,389
4	898	291	185	265	153	582	398	131	375	238	260	3,775
5	926	285	189	268	148	596	383	156	362	244	268	3,825

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 4d: Per Capita Comparison Goods Expenditure, by Category, 2031 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1	950	283	186	259	125	585	432	94	403	205	253	3,776
2	990	299	208	270	131	618	426	117	421	222	289	3,991
3	909	264	182	244	119	569	396	114	386	199	255	3,639
4	964	312	198	285	165	625	427	141	402	255	279	4,054
5	995	307	203	288	159	640	411	168	388	262	287	4,107

Table 4e: Per Capita Comparison Goods Expenditure, by Category, 2034 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1	1,025	306	201	280	135	632	467	101	435	221	274	4,075
2	1,068	323	224	291	142	667	460	126	454	240	312	4,307
3	981	285	197	263	129	614	428	123	417	215	275	3,927
4	1,040	337	214	307	178	674	461	152	434	276	301	4,374
5	1,073	331	219	310	172	690	443	181	419	283	310	4,432

Notes
2019 base expenditure taken from Experian MMG3 data (March 2021)
Comparison goods expenditure growth projected forward from 2019 base using the growth rates in Appendix 3 of Experian Retail Planner Briefing Note 18 (October 2020).
Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 18 (October 2020).

2019 prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 5a: Total Comparison Goods Expenditure, by Category, 2021 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	40.8	12.2	8.0	11.2	5.4	25.2	18.6	4.0	17.3	8.8	10.9
2	29.1	8.8	6.1	7.9	3.9	18.2	12.5	3.4	12.4	6.5	8.5
3	18.5	5.4	3.7	5.0	2.4	11.6	8.1	2.3	7.9	4.0	5.2
4	9.8	3.2	2.0	2.9	1.7	6.4	4.4	1.4	4.1	2.6	2.8
5	8.5	2.6	1.7	2.5	1.4	5.5	3.5	1.4	3.3	2.2	2.5
Total	**106.7**	**32.1**	**21.6**	**29.4**	**14.7**	**66.7**	**47.0**	**12.7**	**45.0**	**24.2**	**29.9**

Table 5b: Total Comparison Goods Expenditure, by Category, 2023 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	44.8	13.4	8.8	12.2	5.9	27.6	20.4	4.4	19.0	9.7	12.0
2	31.9	9.6	6.7	8.7	4.2	19.9	13.8	3.8	13.6	7.2	9.3
3	20.3	5.9	4.1	5.4	2.7	12.7	8.8	2.5	8.6	4.4	5.7
4	10.8	3.5	2.2	3.2	1.8	7.0	4.8	1.6	4.5	2.9	3.1
5	9.3	2.9	1.9	2.7	1.5	6.0	3.8	1.6	3.6	2.5	2.7
Total	**117.1**	**35.3**	**23.7**	**32.3**	**16.2**	**73.2**	**51.6**	**13.9**	**49.3**	**26.6**	**32.8**

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 5c: Total Comparison Goods Expenditure, by Category, 2028 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	51.1	15.3	10.0	14.0	6.7	31.5	23.3	5.0	21.7	11.0	13.6
2	36.4	11.0	7.6	9.9	4.8	22.7	15.7	4.3	15.5	8.2	10.6
3	23.1	6.7	4.6	6.2	3.0	14.5	10.1	2.9	9.8	5.1	6.5
4	12.4	4.0	2.6	3.7	2.1	8.1	5.5	1.8	5.2	3.3	3.6
5	10.7	3.3	2.2	3.1	1.7	6.9	4.4	1.8	4.2	2.8	3.1
Total	**133.8**	**40.3**	**27.0**	**36.8**	**18.4**	**83.6**	**59.0**	**15.9**	**56.3**	**30.4**	**37.4**

Table 5d: Total Comparison Goods Expenditure, by Category, 2031 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	55.6	16.6	10.9	15.2	7.3	34.3	25.3	5.5	23.6	12.0	14.8
2	39.6	11.9	8.3	10.8	5.3	24.7	17.0	4.7	16.8	8.9	11.5
3	25.2	7.3	5.0	6.7	3.3	15.7	11.0	3.1	10.7	5.5	7.1
4	13.5	4.4	2.8	4.0	2.3	8.8	6.0	2.0	5.6	3.6	3.9
5	11.6	3.6	2.4	3.3	1.8	7.4	4.8	2.0	4.5	3.1	3.3
Total	**145.4**	**43.8**	**29.4**	**40.1**	**20.1**	**90.9**	**64.1**	**17.2**	**61.2**	**33.0**	**40.7**

Table 5e: Total Comparison Goods Expenditure, by Category, 2034 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	60.7	18.1	11.9	16.6	8.0	37.4	27.7	6.0	25.8	13.1	16.2
2	43.1	13.0	9.0	11.8	5.7	26.9	18.6	5.1	18.3	9.7	12.6
3	27.4	8.0	5.5	7.3	3.6	17.1	11.9	3.4	11.6	6.0	7.7
4	14.8	4.8	3.0	4.4	2.5	9.6	6.5	2.2	6.2	3.9	4.3
5	12.5	3.9	2.6	3.6	2.0	8.1	5.2	2.1	4.9	3.3	3.6
Total	**158.5**	**47.7**	**32.0**	**43.7**	**21.9**	**99.1**	**69.9**	**18.8**	**66.8**	**36.0**	**44.4**

Total Expenditure = Population for each zone (Table 1) multiplied by per capita expenditure for each zone (Table 4a-4e)

2019 Prices

Appendix C

Convenience Goods Capacity
Statistical Tables

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 1: Main and Top Up Food Shopping Market Share of Convenience Facilities by Zone, 2021 (%)

	Zones									
	1		2		3		4		5	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
ISLE OF WIGHT										
Newport Town Centre										
Co-op, Pyle Street		1			1	2			1	1
Iceland, South Street, Newport	1	1		0			1		0	
Other stores	0	1						3		
Newport Edge of Centre										
Morrisons, South Street	26	16	5	2	1	1	23	4	21	2
Sainsburys, Foxes Road	25	21	3	1	5		10	1	15	1
Lidl, River Way	6	5	4	1				1	13	2
Mark & Spencer Foodhall, Litten Park, Church Litten	2	2	1	1	1		1	1	0	
Newport Out of Centre										
Asda, St Georges Way	11	5	4	1	3		3		4	
Other stores	0	5				1		1		
Cowes										
Aldi, Airfield Way	13	10	0						9	
Sainsburys, High Street	1	5		0						
Mark & Spencer Simply Food, Terminus Road	1	4								
Other stores	1	5								
East Cowes										
Waitrose, Well Road	6	7	2	1	1		2		2	
Co-op, York Avenue	1	2								
Other stores	0	0								
Ryde										
Tesco Extra, Brading Road	2	0	49	17	17	1	13		1	
Co-op, Anglesea Street			9	15	0	1				
Sainsburys Local, Union Street			0	5						
Iceland, High Street			5	7						
Co-op, Somerset Road			0	4				2		
Tesco Express, Rectory Drive, Wootton Bridge	0	0	1	7	1			1		
Other stores			0	13						
Sandown										
Morrisons, Newport Road	1	0	3	1	38	21	21	10		
Aldi, Spithead Business Park	0		8	1	16	11	8			
Sainsburys Local, High Street					2	6				
Co-op, High Street					1	7				
Tesco Express, Sandown Road					0	10				
Co-op, Avenue Road						3				
Other stores						3	0			
Shanklin										
Lidl, Landguard Manor Road	0		3	1	9	8	6	1		
Co-op, Landguard Road					4	16	1	1		
Co-op, Regent Street					0	3				
Other stores					0	2	0	1		
Ventnor										
Co-op, Pier Street							5	12		
Tesco Express, High Street							3	13		
Local Shops, Ventnor Town Centre								3		
Freshwater										
Co-op, Afton Road	1	1						2	28	54
Co-op, Avenue Road										5
Sainsburys Local, School Green Road									5	15
Other stores										11
Others	0	7	3	22		3	4	41	1	9
Internet / delivery										
Don't know/cant remember										
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
Main food market share figure derived from a 50:50 combined figure between Questions 1 & 2, NEMS Household Survey, January 2018
Top-up market share figure derived from Question 5, NEMS Household Survey, January 2018
Excludes responses 'don't do this', 'don't know / varies', 'abroad', and 'internet / delivered'
Figures may not add due to rounding
2019 Prices

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Table 2: Main and Top Up Food Shopping Turnover of Convenience Facilities, 2021 (£m)

	Zones									
	1		2		3		4		5	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
ISLE OF WIGHT										
Newport Town Centre										
Co-op, Pyle Street		0.6			0.3	0.4			0.2	0.1
Iceland, South Street, Newport	0.7	0.5		0.1			0.2		0.1	
Other stores	0.2	0.5						0.3		
Newport Edge of Centre										
Morrisons, South Street	23.9	6.1	3.1	0.6	0.4	0.1	5.2	0.3	4.0	0.2
Sainsburys, Foxes Road	22.9	8.3	2.1	0.2	2.2		2.3	0.1	2.8	0.1
Lidl, River Way	5.3	1.9	2.3	0.3				0.1	2.4	0.2
Mark & Spencer Foodhall, Litten Park, Church Litten	1.5	0.9	0.9	0.3	0.3		0.2	0.1	0.1	
Newport Out of Centre										
Asda, St Georges Way	9.9	1.9	2.3	0.4	1.2		0.7		0.8	
Other stores	0.2	2.0				0.1		0.1		
Cowes										
Aldi, Airfield Way	11.9	3.8	0.1						1.7	
Sainsburys, High Street	0.7	1.9		0.1						
Mark & Spencer Simply Food, Terminus Road	1.2	1.5								
Other stores	0.9	1.8								
East Cowes										
Waitrose, Well Road	5.8	2.7	1.4	0.3	0.3		0.4		0.4	
Co-op, York Avenue	0.5	0.9								
Other stores	0.2	0.1								
Ryde										
Tesco Extra, Brading Road	2.2	0.1	31.4	4.6	7.1	0.2	2.8		0.2	
Co-op, Anglesea Street			5.5	4.0	0.1	0.1				
Sainsburys Local, Union Street			0.1	1.4						
Iceland, High Street			3.2	1.8						
Co-op, Somerset Road			0.1	1.0				0.2		
Tesco Express, Rectory Drive, Wootton Bridge	0.3	0.1	0.8	2.0	0.3			0.1		
Other stores			0.1	3.5						
Sandown										
Morrisons, Newport Road	0.5	0.2	1.7	0.2	15.9	3.8	4.7	1.0		
Aldi, Spithead Business Park	0.3		5.1	0.3	6.4	1.9	1.9			
Sainsburys Local, High Street					0.7	1.1				
Co-op, High Street					0.3	1.3				
Tesco Express, Sandown Road					0.2	1.8				
Co-op, Avenue Road						0.6				
Other stores						0.5	0.1			
Shanklin										
Lidl, Landguard Manor Road	0.2		1.7	0.2	3.6	1.4	1.3	0.1		
Co-op, Landguard Road					1.8	2.9	0.1	0.1		
Co-op, Regent Street					0.1	0.6				
Other stores					0.1	0.4				
Ventnor										
Co-op, Pier Street							1.1	1.2		
Tesco Express, High Street							0.6	1.3		
Local Shops, Ventnor Town Centre								0.2		
Freshwater										
Co-op, Afton Road	0.7	0.3						0.2	5.4	4.4
Co-op, Avenue Road										0.4
Sainsburys Local, School Green Road									1.0	1.2
Other stores										0.9
Others	0.3	2.8	1.6	5.9		0.5	0.9	4.0	0.2	0.8
Internet / delivery										
Don't know/cant remember										
Total	**90.5**	**38.8**	**63.6**	**27.3**	**41.4**	**17.7**	**22.8**	**9.8**	**19.2**	**8.2**

Notes:
Total convenience goods expenditure per zone taken from Table 3
Split in Main/Top-up expenditure derived from Questions 3 and 6, NEMS Household Survey, January 2018
Excludes responses 'don't do this', 'don't know / varies', 'abroad', and 'internet / delivered'
Figures may not add due to rounding
2019 Prices

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Table 3: Total Turnover of Convenience Facilities, 2021 (£m)

	Zones										Total Survey Derived Turnover
	1		2		3		4		5		
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)
ISLE OF WIGHT											
Newport Town Centre											
Co-op, Pyle Street	0	0.6			1	0.7			1	0.3	1.5
Iceland, South Street, Newport	1	1.2	0	0.1			1	0.2	0	0.1	1.6
Other stores	1	0.6					1	0.3			1.0
Newport Edge of Centre											
Morrisons, South Street	23	29.9	4	3.7	1	0.5	17	5.6	15	4.2	43.9
Sainsburys, Foxes Road	24	31.3	3	2.3	4	2.2	7	2.4	11	2.9	41.1
Lidl, River Way	6	7.2	3	2.6			0	0.1	9	2.6	12.5
Mark & Spencer Foodhall, Litten Park, Church Litten	2	2.4	1	1.3	1	0.3	1	0.3	0	0.1	4.3
Newport Out of Centre											
Asda, St Georges Way	9	11.9	3	2.7	2	1.2	2	0.7	3	0.8	17.3
Other stores	2	2.2			0	0.1	0	0.1			2.5
Cowes											
Aldi, Airfield Way	12	15.8	0	0.1					6	1.7	17.5
Sainsburys, High Street	2	2.5	0	0.1							2.6
Mark & Spencer Simply Food, Terminus Road	2	2.7									2.7
Other stores	2	3									2.8
East Cowes											
Waitrose, Well Road	7	8.5	2	1.7	1	0.3	1	0.4	2	0.4	11.4
Co-op, York Avenue	1	1.4									1.4
Other stores	0	0.3									0.3
Ryde											
Tesco Extra, Brading Road	2	2.3	40	36.0	12	7.4	9	2.8	1	0.2	48.7
Co-op, Anglesea Street			10	9.4	0	0.2					9.7
Sainsburys Local, Union Street			2	1.5							1.5
Iceland, High Street			5	5.0							5.0
Co-op, Somerset Road			1	1.1			1	0.2			1.3
Tesco Express, Rectory Drive, Wootton Bridge	0	0.5	3	2.9	1	0.3	0	0.1			3.8
Other stores			4	4							3.6
Sandown											
Morrisons, Newport Road	1	0.7	2	1.9	33	19.7	18	5.7			28.0
Aldi, Spithead Business Park	0	0.3	6	5.4	14	8.3	6	1.9			16.0
Sainsburys Local, High Street					3	1.8					1.8
Co-op, High Street					3	1.6					1.6
Tesco Express, Sandown Road					3	1.9					1.9
Co-op, Avenue Road					1	0.6					0.6
Other stores					1	0.5	0	0.1			0.6
Shanklin											
Lidl, Landguard Manor Road	0	0.2	2	1.9	8	5.0	4	1.5			8.6
Co-op, Landguard Road					8	4.7	1	0.2			5.0
Co-op, Regent Street					1	0.7					0.7
Other stores					1	0.5	1	0.3			0.8
Ventnor											
Co-op, Pier Street							7	2.3			2.3
Tesco Express, High Street							6	1.8			1.8
Local Shops, Ventnor Town Centre							1	0.2			0.2
Freshwater											
Co-op, Afton Road	1	1					1	0	36	10	11.0
Co-op, Avenue Road									2	0.4	0.4
Sainsburys Local, School Green Road									8	2.2	2.2
Other stores									3	0.9	0.9
Others	2	3.1	8	7.5	1	0.5	15	4.9	3	0.9	16.9
Internet / delivery											
Don't know/cant remember											
Total	**100**	**129.3**	**100**	**90.9**	**100**	**59.1**	**100**	**32.5**	**100**	**27.4**	**339.2**

Notes:
Figures may not add due to rounding.

2019 Prices

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Table 4. Survey-derived performance of convenience floorspace compared to expected benchmark performance at 2021

	Gross Floorspace (sq.m)	Net Sales (sq.m)	Net Convenience Sales Area (sq m)	Sales Density (£ per sq.m)	Benchmark Convenience Goods Turnover (£m)	Survey Turnover (£m)	Inflow Allowance (%)	Estimated Survey T/O with Inflow (£m)	Overtrading (£m)
Newport Town Centre									
Co-op, Pyle Street	1,859	811	811	11,221	9.1	1.5	5	1.6	-7.5
Iceland, South Street, Newport	804	521	521	6,675	3.5	1.6	5	1.7	-1.8
Other stores	-	-	-	-	1.0	1.0	5	1.0	0.0
Newport Edge of Centre									
Morrisons, South Street	5,007	2,933	2,640	12,397	32.7	43.9	8	47.4	14.7
Sainsburys, Foxes Road	9,535	6,062	3,637	11,577	42.1	41.1	8	44.4	2.3
Lidl, River Way	1,485	1,057	846	10,589	9.0	12.5	8	13.5	4.6
Mark & Spencer Foodhall, Litten Park, Church Litten	1,456	873	873	10,359	9.0	4.3	8	4.7	-4.4
Newport Out of Centre									
Asda, St Georges Way	7,727	4,715	2,829	13,679	38.7	17.3	8	18.7	-20.0
Other stores	-	-	-	-	2.5	2.5	5	2.6	0.1
Newport Sub-total	**27,873**	**16,972**			**147.5**	**125.7**		**135.6**	**-12.0**
Cowes									
Aldi, Airfield Way	1,587	1,012	810	10,589	8.6	17.5	8	18.9	10.3
Sainsburys, High Street	800	459	344	11,577	4.0	2.6	8	2.8	-1.1
Mark & Spencer Simply Food, Terminus Road	1,139	714	643	10,359	6.7	2.7	8	2.9	-3.8
Other stores	-	-	-	-	2.8	2.8	5	2.9	0.1
Cowes Sub-Total	**3,526**	**2,185**			**22.0**	**25.6**		**27.5**	**5.6**
East Cowes									
Waitrose, Well Road	2,715	1,553	1,320	12,475	16.5	11.4	12	12.8	-3.7
Co-op, York Avenue	461	297	297	11,221	3.3	1.4	3	1.5	-1.9
Other stores	-	-	-	-	0.3	0.3	3	0.3	0.0
East Cowes Sub-total	**3,176**	**1,850**			**20.1**	**13.1**		**14.5**	**-5.6**
Ryde									
Tesco Extra, Brading Road	9,810	6,729	4,374	13,295	58.2	48.7	8	52.6	-5.5
Co-op, Anglesea Street	2,876	1,683	1,515	11,221	17.0	9.7	5	10.1	-6.8
Sainsburys Local, Union Street	366	207	207	11,577	2.4	1.5	5	1.6	-0.8
Iceland, High Street	900	583	583	6,675	3.9	5.0	3	5.1	1.3
Co-op, Somerset Road	238	152	152	11,221	1.7	1.3	3	1.3	-0.4
Tesco Express, Rectory Drive, Wootton Bridge	396	265	265	13,295	3.5	3.8	3	3.9	0.4
Other stores	-	-	-	-	3.6	3.6	3	3.7	0.1
Ryde Sub-total	**14,586**	**9,619**			**90.3**	**73.5**		**78.4**	**-11.9**
Sandown									
Aldi, Spithead Business Park	1,425	982	786	10,589	8.3	16.0	8	17.3	8.9
Morrisons, Newport Road	3,408	1,996	1,796	12,397	22.3	28.0	8	30.2	8.0
Sainsburys Local, High Street	761	347	347	11,577	4.0	1.8	5	1.9	-2.1
Co-op, Avenue Road	549	322	322	11,221	3.6	0.6	3	0.6	-3.0
Co-op, High Street	623	299	299	11,221	3.4	1.6	5	1.6	-1.7
Tesco Express, Sandown Road	370	197	197	13,295	2.6	1.9	3	2.0	-0.6
Other stores	-	-	-	-	0.6	0.6	3	0.6	0.0
Sandown Sub-Total	**7,136**	**4,143**			**44.8**	**50.4**		**54.2**	**9.4**
Shanklin									
Lidl, Landguard Manor Road	1,934	1,378	1,102	10,589	11.7	8.6	8	9.3	-2.4
Co-op, Landguard Road	1,508	882	794	11,221	8.9	5.0	5	5.2	-3.7
Co-op, Regent Street	874	335	335	11,221	3.8	0.7	5	0.7	-3.1
Other stores	-	-	-	-	0.8	0.8	3	0.8	0.0
Shanklin Sub-total	**2,382**	**1,217**			**13.4**	**6.4**		**6.7**	**-6.7**
Ventnor									
Co-op, Pier Street	1,059	620	620	11,221	7.0	2.3	7	2.5	-4.5
Tesco Express, High Street	348	244	244	13,295	3.2	1.8	5	1.9	-1.3
Others	-	-	-	-	0.2	0.2	3	0.3	0.0
Ventnor Sub-total	**1,407**	**864**			**10.4**	**4.4**		**4.7**	**-5.8**
Freshwater									
Co-op, Afton Road	2,000	1,280	896	11,221	10.1	11.0	5	11.6	1.5
Co-op, Avenue Road	651	381	381	11,221	4.3	0.4	3	0.4	-3.8
Sainsburys Local, School Green Road	435	235	235	11,577	2.7	2.2	3	2.3	-0.5
Others	-	-	-	-	0.9	0.9	3	0.9	0.0
Freshwater Sub-total	**3,086**	**1,896**			**17.9**	**14.5**		**15.1**	**-2.8**

Notes:
Gross floorspace derived from ORC Storepoint Database, Experian Goad or Tetra Tech Assessment
Net convenience floorspace derived from ORC Storepoint Database, Experian Goad or Tetra Tech Assessment
Proportion of net convenience floorspace assessed by Tetra Tech based on store visits.
Sales densities derived from information provided by GlobalData.
It has been assumed that all unnamed convenience stores within a centre are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that ientified by the survey)
Survey derived performance of stores calculated by addiing together 'main' and 'top up' turnover as set out in Table 3

2019 Prices

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TABLE 5: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN NEWPORT

Table 5a: Estimated 'Capacity' for Convenience Goods Facilities in Newport

Year	Benchmark Turnover £m[1]	Newport Turnover £m[2]	Newport Inflow £m	Surplus Expenditure £m
2021	147.5	125.7	9.9	-12.0
2023	148.7	119.0	9.3	-20.3
2028	148.7	120.9	9.5	-18.3
2031	148.7	121.9	9.6	-17.3
2034	148.7	123.0	9.6	-16.1
Market Share (%)		**37.1**		

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Newport facilities
2019 Prices

Table 5b: Quantitative Need for Additional Convenience Goods Floorspace in Newport

Year	Surplus £m	Floorspace Requirement
2021	-12.0	0
2023	-20.3	0
2028	-18.3	0
2034	-16.1	0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

TABLE 6: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN COWES

Table 6a: Estimated 'Capacity' for Convenience Goods Facilities in Cowes

Year	Benchmark Turnover £m[1]	Cowes Turnover £m[2]	Cowes Inflow £m	Surplus Expenditure £m
2021	22.0	25.6	2.0	5.6
2023	22.1	24.2	1.9	3.9
2028	22.1	24.6	1.9	4.3
2031	22.1	24.8	1.9	4.6
2034	22.1	25.0	1.9	4.8

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Cowes facilities
2019 Prices

Table 6b: Quantitative Need for Additional Convenience Goods Floorspace in Cowes

Year	Surplus £m	Floorspace Requirement (sq m net)
2021	5.6	500
2023	3.9	300
2028	4.3	400
2031	4.6	400
2034	4.8	400

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 prices

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TABLE 7: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN EAST COWES

Table 7a: Estimated 'Capacity' for Convenience Goods Facilities in East Cowes

Year	Benchmark Turnover £m[1]	East Cowes Turnover £m[2]	East Cowes Inflow £m	Surplus Expenditure £m
2018	20.1	13.1	1.4	-5.6
2023	20.2	12.4	1.3	-6.5
2028	20.2	12.6	1.4	-6.3
2031	20.2	12.7	1.4	-6.2
2034	20.2	12.8	1.4	-6.1

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by East Cowes facilities
2019 Prices

Table 7b: Quantitative Need for Additional Convenience Goods Floorspace in East Cowes

Year	Surplus £m	Floorspace Requirement (sq m net)
2018	-5.6	0
2023	-6.5	0
2028	-6.3	0
2031	-6.2	0
2034	-6.1	0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

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TABLE 8: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN RYDE

Table 8a: Estimated 'Capacity' for Convenience Goods Facilities in Ryde

Year	Benchmark Turnover £m[1]	Ryde Turnover £m[2]	Ryde Inflow £m	Surplus Expenditure £m
2021	90.3	73.5	4.9	-11.9
2023	91.0	69.6	4.6	-16.7
2028	91.0	70.7	4.7	-15.6
2031	91.0	71.3	4.7	-15.0
2034	91.0	72.0	4.8	-14.3

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Ryde facilities
2019 Prices

Table 8b: Quantitative Need for Additional Convenience Goods Floorspace in Ryde

Year	Surplus £m	Floorspace Requirement (sq m net)
2021	-11.9	0
2023	-16.7	0.0
2028	-15.6	0.0
2031	-15.0	0.0
2034	-14.3	0.0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

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TABLE 9: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN SANDOWN

Table 9a: Estimated 'Capacity' for Convenience Goods Facilities in Sandown

Year	Benchmark Turnover £m[1]	Sandown Turnover £m[2]	Sandown Inflow £m	Surplus Expenditure £m
2021	44.8	50.4	3.8	9.4
2023	45.1	47.8	3.6	6.2
2028	45.1	48.5	3.6	7.0
2031	45.1	48.9	3.7	7.4
2034	45.1	49.4	3.7	7.9

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Sandown facilities
2019 Prices

Table 9b: Quantitative Need for Additional Convenience Goods Floorspace in Sandown

Year	Surplus £m	Floorspace Requirement (sq m net)
2021	9.4	800
2023	6.2	500
2028	7.0	600
2031	7.4	700
2034	7.9	700

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

Table 9c: Extant Convenience Goods Commitments in Sandown

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Convenience Turnover (£m)	Status
Morrisons, Newport Road, Sandown, Isle Of Wight, PO36 9PA	TCP/19905/N or P/01501/17	Proposed extension to foodstore; reconfiguration of car parking facilities and access arrangements; associated landscaping	1,909	1,266	12,397	15.7	Implemented
TOTAL				**1,266**		**15.7**	

Notes:
Commitment provided by Isle of Wight Council
Floorspace is taken from Planning and Retail Study submitted with the application.
Sales density for Morrison's is from Verdict.
2016 prices

Table 9d: Quantitative Need for Additional Convenience Goods Floorspace in Sandown - After Commitments

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)
2021	9.4	15.7	-6.3	0
2023	6.2	15.8	-9.6	0
2028	7.0	15.8	-8.8	0
2031	7.4	15.8	-8.4	0
2034	7.9	15.8	-7.9	0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
Residual calculated by subtracting turnover of commitments (sourced from Table 9c) from surplus expenditure (sourced from Table 9a).
2019 prices

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TABLE 10: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN SHANKLIN

Table 10a: Estimated 'Capacity' for Convenience Goods Facilities in Shanklin

Year	Benchmark Turnover £m[1]	Shanklin Turnover £m[2]	Shanklin Inflow £m	Surplus Expenditure £m
2021	13.4	6.4	0.3	-6.7
2023	13.6	6.1	0.3	-7.2
2028	13.6	6.2	0.3	-7.1
2031	13.6	6.2	0.3	-7.0
2034	13.6	6.3	0.3	-7.0

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Shanklin facilities
2019 Prices

Table 10b: Quantitative Need for Additional Convenience Goods Floorspace in Shanklin

Year	Surplus £m	Floorspace Requirement (sq m net)
2021	-6.7	0
2023	-7.2	0
2028	-7.1	0
2031	-7.0	0
2034	-7.0	0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

TABLE 11: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN VENTNOR

Table 11a: Estimated 'Capacity' for Convenience Goods Facilities in Ventnor

Year	Benchmark Turnover £m[1]	Ventnor Turnover £m[2]	Ventnor Inflow £m	Surplus Expenditure £m
2021	10.4	4.4	0.3	-5.8
2023	10.5	4.2	0.2	-6.1
2028	10.5	4.3	0.3	-6.0
2031	10.5	4.3	0.3	-6.0
2034	10.5	4.3	0.3	-5.9

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Ventnor facilities
2019 Prices

Table 11b: Quantitative Need for Additional Convenience Goods Floorspace in Ventnor

Year	Surplus £m	Floorspace Requirement (sq m net)
2021	-5.8	0
2023	-6.1	0
2028	-6.0	0
2031	-6.0	0
2034	-5.9	0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

TABLE 12: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN FRESHWATER

Table 12a: Estimated 'Capacity' for Convenience Goods Facilities in Freshwater

Year	Benchmark Turnover £m[1]	Freshwater Turnover £m[2]	Freshwater Inflow £m	Surplus Expenditure £m
2018	22.0	14.5	0.7	-6.8
2023	22.1	13.7	0.6	-7.8
2028	22.1	13.9	0.6	-7.6
2031	22.1	14.0	0.6	-7.5
2034	22.1	14.2	0.6	-7.3

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2. Assumes constant market share claimed by Freshwater facilities
2019 Prices

Table 12b: Quantitative Need for Additional Convenience Goods Floorspace in Freshwater

Year	Surplus £m	Floorspace Requirement (sq m net)
2018	-6.8	0
2023	-7.8	0
2028	-7.6	0
2031	-7.5	0
2034	-7.3	0

Notes:
1. Average sales density assumed to be £11,286 per sq.m (@2021) based on the average sales density of the leading ten supermarkets - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)
2019 Prices

Appendix D

Comparison Goods Capacity
Statistical Tables

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 1: Expenditure pattern of clothing and footwear goods, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**85**	**34.6**	**85**	**24.7**	**92**	**17.0**	**93**	**9.1**	**89**	**7.6**	**93.1**
Newport Town Centre	**62**	**25.2**	**46**	**13.2**	**53**	**9.8**	**56**	**5.5**	**67.9**	**5.8**	**59.5**
Newport Town Centre	62	25.2	46	13.2	53	9.8	56	5.5	68	5.8	59.5
Newport Edge of Centre	**11**	**4.5**	**14**	**4.1**	**13**	**2.3**	**17**	**1.7**	**14**	**1.2**	**13.8**
Wakes Retail Park, Medina Way											
Marks & Spencer, Church Litten	7	3.0	13	3.8	11	2.0	15	1.5	8	0.6	11.0
Sainsburys Superstore, Foxes Road	4	1.5	1	0.3	2	0.3	2	0.2	6	0.5	2.8
Morrisons, South Street											
Towngate Retail Park											
Lidl, River Way									1	0.1	0.1
Newport Out of Centre	**7**	**2.8**	**3**	**0.9**	**8**	**1.5**	**9**	**0.9**	**4**	**0.3**	**6.4**
B&Q, Dodnor Lane					1	0.1					0.1
Carisbrooke Retail Park, Taylor Road			2	0.5			4	0.4			0.9
Asda, St Georges Way	3	1.2			1	0.1	2	0.2			1.6
Matalan, Furrlongs	4	1.5	1	0.3	6	1.2	1	0.1	4	0.3	3.4
Riverway Industrial Estate, Riverway											
Others	0	0.1	1	0.2			1	0.1			0.4
Cowes	**3**	**1.2**	**1**	**0.4**							**1.6**
Cowes Town Centre	2	1.0	1	0.4							1.4
The Range, Place Road											
Aldi, Airfield Way	0	0.1									0.1
Others	0	0.1									0.1
East Cowes	**0**	**0.1**									**0.1**
East Cowes Town Centre	0	0.1									0.1
Ryde	**2**	**0.8**	**20**	**5.9**	**6**	**1.1**	**1**	**0.1**			**7.9**
Ryde Town Centre	1	0.4	19	5.6	4	0.7					6.7
Tesco Extra, Brading Road	1	0.4	1	0.2	2	0.4	1	0.1			1.2
Others											
Sandown					**6**	**1.1**					**1.1**
Sandown Town Centre					5	0.9					0.9
Morrisons, Newport Road											
Aldi, Spithead Bus Park											
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others					1	0.2					0.2
Shanklin					**5**	**0.9**	**6**	**0.6**			**1.4**
Shanklin Town Centre					5	0.9	4	0.4			1.3
Lidl, Landguard Manor Road							1	0.1			0.1
Ventnor					**2**	**0.3**	**4**	**0.3**			**0.6**
Ventnor Town Centre					2	0.3	4	0.3			0.6
Freshwater									**3**	**0.3**	**0.3**
Freshwater Town Centre									3	0.3	0.3
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight			**1**	**0.2**							**0.2**
OUTSIDE SURVEY AREA	**15**	**6.2**	**15**	**4.4**	**8**	**1.4**	**7**	**0.7**	**11**	**0.9**	**13.6**
Southampton	7	3.0	4	1.2	3	0.6	2	0.2	5	0.4	5.6
Portsmouth	2	0.9	7	2.1	1	0.1	2	0.2	1	0.1	3.4
Central London	1	0.4	1	0.3	1	0.3	1	0.1			1.1
Other	5	1.9	3	0.8	2	0.4	1	0.1	5	0.4	3.6
Total	**100**	**40.8**	**100**	**29.1**	**100**	**18.5**	**100**	**9.8**	**100**	**8.5**	**106.7**

Notes:
Market share figures derived from Question 7, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 2: Expenditure pattern of books, CDs and DVDs, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**91**	**11.1**	**98**	**8.6**	**97**	**5.2**	**100**	**3.2**	**97**	**2.5**	**30.6**
Newport Town Centre	**74**	**9.0**	**37**	**3.2**	**34**	**1.8**	**69**	**2.2**	**59**	**1.6**	**17.8**
Newport Town Centre	74	9.0	37	3.2	34	1.8	69	2.2	59	1.6	17.8
Newport Edge of Centre	**13**	**1.6**	**3**	**0.3**	**6**	**0.3**			**5**	**0.1**	**2.3**
Wakes Retail Park, Medina Way											
Marks & Spencer, Church Litten											
Sainsburys Superstore, Foxes Road	9	1.1	1	0.1	1	0.1			3	0.1	1.3
Morrisons, South Street	3	0.4	2	0.2	5	0.3					0.9
Towngate Retail Park											
Lidl, River Way									3	0.1	0.1
Newport Out of Centre	**1**	**0.1**			**2**	**0.1**			**3**	**0.1**	**0.3**
B&Q, Dodnor Lane											
Carisbrooke Retail Park, Taylor Road											
Asda, St Georges Way	1	0.1			2	0.1					0.2
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway											
Others									3	0.1	0.1
Cowes	**1**	**0.1**							**11**	**0.3**	**0.4**
Cowes Town Centre	1	0.1							11	0.3	0.4
The Range, Place Road											
Aldi, Airfield Way											
Others											
East Cowes	**1**	**0.1**			**3**	**0.2**					**0.2**
East Cowes Town Centre	1	0.1			3	0.2					0.2
Ryde	**2**	**0.2**	**57**	**5.0**	**27**	**1.4**	**9**	**0.3**			**7.0**
Ryde Town Centre	2	0.2	34	2.9	7	0.4					3.5
Tesco Extra, Brading Road			23	2.0	20	1.1	6	0.2			3.3
Others							3	0.1			0.1
Sandown			**1**	**0.1**	**16**	**0.9**	**7**	**0.2**			**1.1**
Sandown Town Centre					4	0.2					0.2
Morrisons, Newport Road			1	0.1	12	0.6	7	0.2			0.9
Aldi, Spithead Bus Park											
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others											
Shanklin	**1**	**0.1**			**8**	**0.4**	**9**	**0.3**			**0.8**
Shanklin Town Centre	1	0.1			8	0.4	9	0.3			0.8
Lidl, Landguard Manor Road											
Ventnor							**7**	**0.2**			**0.2**
Ventnor Town Centre							7	0.2			0.2
Freshwater									**17**	**0.4**	**0.4**
Freshwater Town Centre									17	0.4	0.4
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight			**1**	**0.1**	**1**	**0.1**			**3**	**0.1**	**0.2**
OUTSIDE SURVEY AREA	**9**	**1.1**	**2**	**0.2**	**3**	**0.2**			**3**	**0.1**	**1.5**
Southampton	2	0.3			1	0.1			3	0.1	0.4
Portsmouth	2	0.2			1	0.1					0.2
Central London	1	0.1									0.1
Other	4	0.5	2	0.2	1	0.1					0.8
Total	**100**	**12.2**	**100**	**8.8**	**100**	**5.4**	**100**	**3.2**	**100**	**2.6**	**32.1**

Notes:
Market share figures derived from Question 8, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 3: Expenditure pattern of furnishings and household textile goods, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**91**	**7.3**	**91**	**5.5**	**89**	**3.3**	**92**	**1.9**	**85**	**1.5**	**19.4**
Newport Town Centre	**40**	**3.2**	**26.5**	**1.6**	**23**	**0.8**	**35**	**0.7**	**18**	**0.3**	**6.7**
Newport Town Centre	40	3.2	27	1.6	23	0.8	35	0.7	18	0.3	6.7
Newport Edge of Centre	**27**	**2.1**	**31**	**1.9**	**31**	**1.1**	**29**	**0.6**	**47**	**0.8**	**6.6**
Wakes Retail Park, Medina Way	19	1.5	27	1.6	26	1.0	21	0.4	36	0.6	5.2
Marks & Spencer, Church Litten	2	0.1	4	0.2	3	0.1	3	0.1	6	0.1	0.6
Sainsburys Superstore, Foxes Road	3	0.3			1	0.0			1	0.0	0.3
Morrisons, South Street	2	0.2	0	0.0	1	0.0	5	0.1	4	0.1	0.4
Towngate Retail Park											
Lidl, River Way											
Newport Out of Centre	**10**	**0.8**	**7**	**0.5**	**10**	**0.4**	**15**	**0.3**	**7**	**0.1**	**2.0**
B&Q, Dodnor Lane	2	0.2	2	0.1	3	0.1			4	0.1	0.5
Carisbrooke Retail Park, Taylor Road	3	0.3	3	0.2	4	0.2	11	0.2	1	0.0	0.8
Asda, St Georges Way	3	0.2									0.2
Matalan, Furrlongs	0	0.0					3	0.1			0.1
Riverway Industrial Estate, Riverway	1	0.1	3	0.2	3	0.1			2	0.0	0.4
Others			1	0.0			2	0.0			0.1
Cowes	**10**	**0.8**	**5**	**0.3**	**3**	**0.1**	**3**	**0.1**	**7**	**0.1**	**1.5**
Cowes Town Centre	8	0.6	3	0.2	2	0.1	3	0.1	7	0.1	1.1
The Range, Place Road	0	0.0	3	0.2	1	0.0					0.2
Aldi, Airfield Way	1	0.1									0.1
Others	1	0.1									0.1
East Cowes											
East Cowes Town Centre											
Ryde	**2**	**0.2**	**16**	**1.0**	**5**	**0.2**	**1**	**0.0**	**2**	**0.0**	**1.3**
Ryde Town Centre	2	0.2	12	0.7	3	0.1	1	0.0			1.0
Tesco Extra, Brading Road			3	0.2	1	0.0					0.2
Others			1	0.0	1	0.0			2	0.0	0.1
Sandown	**2**	**0.1**	**1**	**0.1**	**8**	**0.3**	**4**	**0.1**	**2**	**0.0**	**0.6**
Sandown Town Centre	1	0.0	0	0.0	5	0.2	3	0.1	2	0.0	0.4
Morrisons, Newport Road											
Aldi, Spithead Bus Park											
Lake Industrial Estate, Lake Industrial Way	1	0.1	0	0.0	1	0.0					0.1
Spithead Business Centre, Newport Road	0	0.0			2	0.1					0.1
Others							2	0.0			0.0
Shanklin			**0**	**0.0**	**9**	**0.3**	**1**	**0.0**			**0.4**
Shanklin Town Centre			0	0.0	9	0.3	1	0.0			0.4
Lidl, Landguard Manor Road											
Ventnor							**3**	**0.1**	**1**	**0.0**	**0.1**
Ventnor Town Centre							3	0.1	1	0.0	0.1
Freshwater	**0**	**0.0**							**2**	**0.0**	**0.1**
Freshwater Town Centre	0	0.0							2	0.0	0.1
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight			**3**	**0.2**	**1**	**0.0**					**0.2**
OUTSIDE SURVEY AREA	**9**	**0.8**	**9**	**0.6**	**11**	**0.4**	**8**	**0.2**	**15**	**0.3**	**2.2**
Southampton	8	0.7	7	0.4	10	0.4	3	0.1	15	0.3	1.8
Portsmouth			0	0.0							0.0
Central London	1	0.0	1	0.1			4	0.1			0.2
Other	1	0.0	1	0.1	1	0.0	1	0.0			0.2
Total	**100**	**8.0**	**100**	**6.1**	**100**	**3.7**	**100**	**2.0**	**100**	**1.7**	**21.6**

Notes:
Market share figures derived from Question 9, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 4: Expenditure pattern of small household goods such as glassware and utensils, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**94**	**10.5**	**89**	**7.1**	**92**	**4.6**	**92**	**2.7**	**95**	**2.3**	**27.1**
Newport Town Centre	**41**	**4.6**	**21.3**	**1.7**	**28**	**1.4**	**34**	**1.0**	**24**	**0.6**	**9.3**
Newport Town Centre	41	4.6	21	1.7	28	1.4	34	1.0	24	0.6	9.3
Newport Edge of Centre	**31**	**3.5**	**14**	**1.1**	**18**	**0.9**	**19**	**0.5**	**31**	**0.8**	**6.8**
Wakes Retail Park, Medina Way	9	1.0	11	0.8	12	0.6	9	0.3	13	0.3	3.0
Marks & Spencer, Church Litten	3	0.4	0	0.0	3	0.2	3	0.1	6	0.1	0.8
Sainsburys Superstore, Foxes Road	12	1.4	2	0.2	3	0.1	4	0.1	7	0.2	2.0
Morrisons, South Street	6	0.7					2	0.1	5	0.1	0.8
Towngate Retail Park			1	0.0							0.0
Lidl, River Way	0	0.0									0.0
Newport Out of Centre	**8**	**0.9**	**5**	**0.4**	**9**	**0.4**	**6**	**0.2**	**9**	**0.2**	**2.1**
B&Q, Dodnor Lane			1	0.0							0.0
Carisbrooke Retail Park, Taylor Road	3	0.3			4	0.2	5	0.1	6	0.2	0.8
Asda, St Georges Way	3	0.4	4	0.3	2	0.1			3	0.1	0.8
Matalan, Furrlongs	2	0.2			1	0.0	1	0.0			0.3
Riverway Industrial Estate, Riverway			1	0.0	1	0.0					0.1
Others	0	0.0			2	0.1					0.1
Cowes	**10**	**1.2**	**1**	**0.1**	**4**	**0.2**	**2**	**0.0**	**5**	**0.1**	**1.7**
Cowes Town Centre	9	1.0	0	0.0	3	0.1	2	0.0	5	0.1	1.3
The Range, Place Road	1	0.1	1	0.1	2	0.1					0.3
Aldi, Airfield Way	0	0.0									0.0
Others											
East Cowes	**1**	**0.1**									**0.1**
East Cowes Town Centre	1	0.1									0.1
Ryde	**1**	**0.1**	**47**	**3.7**	**12**	**0.6**	**3**	**0.1**	**1**	**0.0**	**4.6**
Ryde Town Centre			17	1.4	1	0.0					1.4
Tesco Extra, Brading Road	1	0.1	27	2.1	11	0.6	3	0.1	1	0.0	3.0
Others			2	0.2							0.2
Sandown			**0**	**0.0**	**2**	**0.1**	**4**	**0.1**			**0.3**
Sandown Town Centre											
Morrisons, Newport Road			0	0.0	2	0.1	3	0.1			0.2
Aldi, Spithead Bus Park							2	0.1			0.1
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others											
Shanklin					**19**	**0.9**	**5**	**0.1**			**1.1**
Shanklin Town Centre					17	0.9	5	0.1			1.0
Lidl, Landguard Manor Road					2	0.1					0.1
Ventnor							**19**	**0.5**			**0.5**
Ventnor Town Centre							19	0.5			0.5
Freshwater	**1**	**0.1**							**24**	**0.6**	**0.7**
Freshwater Town Centre	1	0.1							24	0.6	0.7
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight			**1**	**0.1**							**0.1**
OUTSIDE SURVEY AREA	**6**	**0.7**	**11**	**0.8**	**8**	**0.4**	**8**	**0.2**	**5**	**0.1**	**2.3**
Southampton	4	0.5	10	0.8	4	0.2	7	0.2	5	0.1	1.8
Portsmouth					1	0.0	1	0.0			0.1
Central London	1	0.1	1	0.0							0.1
Other	1	0.1	0	0.0	3	0.2					0.3
Total	**100**	**11.2**	**100**	**7.9**	**100**	**5.0**	**100**	**2.9**	**100**	**2.5**	**29.4**

Notes:
Market share figures derived from Question 10, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 5: Expenditure pattern of clocks, jewellery and watches, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**81**	**4.4**	**87**	**3.4**	**92**	**2.2**	**96**	**1.6**	**96**	**1.3**	**12.9**
Newport Town Centre	**54**	**2.9**	**44**	**1.7**	**45**	**1.1**	**46**	**0.8**	**63**	**0.9**	**7.3**
Newport Town Centre	54	2.9	44	1.7	45	1.1	46	0.8	63	0.9	7.3
Newport Edge of Centre	**2**	**0.1**	**2**	**0.1**	**1**	**0.0**	**4**	**0.1**	**4**	**0.1**	**0.4**
Wakes Retail Park, Medina Way	1	0.1	1	0.0	1	0.0	2	0.0			0.2
Marks & Spencer, Church Litten			1	0.1			2	0.0	2	0.0	0.1
Sainsburys Superstore, Foxes Road	1	0.1							2	0.0	0.1
Morrisons, South Street											
Towngate Retail Park											
Lidl, River Way											
Newport Out of Centre	**6**	**0.3**	**3**	**0.1**	**6**	**0.1**	**5**	**0.1**	**6**	**0.1**	**0.8**
B&Q, Dodnor Lane											
Carisbrooke Retail Park, Taylor Road	6	0.3	3	0.1	6	0.1	5	0.1	6	0.1	0.8
Asda, St Georges Way											
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway											
Others											
Cowes	**16**	**0.8**			**2**	**0.1**	**6**	**0.1**			**1.0**
Cowes Town Centre	15	0.8			1	0.0	6	0.1			0.9
The Range, Place Road	1	0.0			1	0.0					0.1
Aldi, Airfield Way											
Others											
East Cowes	**0**	**0.0**									**0.0**
East Cowes Town Centre	0	0.0									0.0
Ryde	**1**	**0.0**	**31**	**1.2**	**5**	**0.1**			**2**	**0.0**	**1.4**
Ryde Town Centre	1	0.0	28	1.1	3	0.1			2	0.0	1.2
Tesco Extra, Brading Road			2	0.1	2	0.0					0.1
Others					1	0.0					0.0
Sandown			**1**	**0.1**	**8**	**0.2**	**2**	**0.0**			**0.3**
Sandown Town Centre			1	0.1	8	0.2	2	0.0			0.3
Morrisons, Newport Road											
Aldi, Spithead Bus Park											
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others											
Shanklin			**1**	**0.0**	**23**	**0.6**	**14**	**0.2**			**0.8**
Shanklin Town Centre			1	0.0	23	0.6	14	0.2			0.8
Lidl, Landguard Manor Road											
Ventnor					**1**	**0.0**	**18**	**0.3**			**0.3**
Ventnor Town Centre					1	0.0	18	0.3			0.3
Freshwater	**1**	**0.1**							**21**	**0.3**	**0.3**
Freshwater Town Centre	1	0.1							21	0.3	0.3
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight	**1**	**0.1**	**4**	**0.2**							**0.2**
OUTSIDE SURVEY AREA	**19**	**1.0**	**13**	**0.5**	**8**	**0.2**	**4**	**0.1**	**4**	**0.1**	**1.8**
Southampton	5	0.3	6	0.2	2	0.0			4	0.1	0.6
Portsmouth	2	0.1	3	0.1							0.2
Central London	1	0.1	1	0.0	1	0.0					0.1
Other	11	0.6	3	0.1	5	0.1	4	0.1			0.9
Total	**100**	**5.4**	**100**	**3.9**	**100**	**2.4**	**100**	**1.7**	**100**	**1.4**	**14.7**

Notes:
Market share figures derived from Question 11, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 6: Expenditure pattern of toys, games, bicycles and other recreational / sports goods, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**95**	**23.8**	**96**	**17.4**	**95**	**11.0**	**89**	**5.7**	**98**	**5.4**	**63.3**
Newport Town Centre	**71**	**17.8**	**43**	**7.8**	**47**	**5.4**	**41**	**2.6**	**46**	**2.5**	**36.1**
Newport Town Centre	71	17.8	43	7.8	47	5.4	41	2.6	46	2.5	36.1
Newport Edge of Centre	**6**	**1.5**	**4**	**0.7**	**6**	**0.6**	**8**	**0.5**	**12**	**0.7**	**4.0**
Wakes Retail Park, Medina Way	1	0.2			1	0.1	2	0.1	5	0.3	0.7
Marks & Spencer, Church Litten					1	0.1	2	0.1	2	0.1	0.3
Sainsburys Superstore, Foxes Road	2	0.4			1	0.1	2	0.2	3	0.1	0.8
Morrisons, South Street					1	0.1					0.1
Towngate Retail Park	4	0.9	4	0.7	1	0.1	2	0.1	3	0.1	2.0
Lidl, River Way											
Newport Out of Centre	**8**	**2.0**	**2**	**0.4**	**8**	**0.9**	**16**	**1.0**	**9**	**0.5**	**4.8**
B&Q, Dodnor Lane											
Carisbrooke Retail Park, Taylor Road	8	1.9	2	0.3	8	0.9	14	0.9	9	0.5	4.5
Asda, St Georges Way	1	0.1					2	0.1			0.2
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway											
Others			1	0.1							0.1
Cowes	**6**	**1.4**	**4**	**0.7**					**11**	**0.6**	**2.7**
Cowes Town Centre	3	0.8	2	0.4					11	0.6	1.7
The Range, Place Road	1	0.3	1	0.2							0.5
Aldi, Airfield Way	1	0.4									0.4
Others			1	0.1							0.1
East Cowes									**3**	**0.1**	**0.1**
East Cowes Town Centre									3	0.1	0.1
Ryde	**3**	**0.8**	**39**	**7.2**	**7**	**0.8**	**2**	**0.1**	**2**	**0.1**	**9.0**
Ryde Town Centre	1	0.3	22	4.0	2	0.3	2	0.1			4.7
Tesco Extra, Brading Road	1	0.3	17	3.0	4	0.4			2	0.1	3.9
Others	1	0.1	1	0.1	1	0.1					0.4
Sandown	**1**	**0.1**			**2**	**0.2**					**0.3**
Sandown Town Centre					2	0.2					0.2
Morrisons, Newport Road											
Aldi, Spithead Bus Park											
Lake Industrial Estate, Lake Industrial Way	1	0.1									0.1
Spithead Business Centre, Newport Road											
Others											
Shanklin			**4**	**0.7**	**26**	**3.0**	**15**	**0.9**			**4.6**
Shanklin Town Centre			4	0.7	25	2.9	15	0.9			4.5
Lidl, Landguard Manor Road					1	0.1					0.1
Ventnor	**1**	**0.1**					**7**	**0.5**			**0.6**
Ventnor Town Centre	1	0.1					7	0.5			0.6
Freshwater									**12**	**0.6**	**0.6**
Freshwater Town Centre									9	0.5	0.5
Honnor & Jeffrey Afton Garden Centre, Afton Road									3	0.1	0.1
Other on the Isle of Wight									**4**	**0.2**	**0.2**
OUTSIDE SURVEY AREA	**5**	**1.4**	**4**	**0.7**	**5**	**0.6**	**11**	**0.7**	**2**	**0.1**	**3.5**
Southampton	4	1.1	1	0.1	3	0.3	9	0.6	2	0.1	2.3
Portsmouth			3	0.5							0.5
Central London											
Other	1	0.3	1	0.1	2	0.2	2	0.1			0.7
Total	**100**	**25.2**	**100**	**18.2**	**100**	**11.6**	**100**	**6.4**	**100**	**5.5**	**66.7**

Notes:
Market share figures derived from Question 12, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

Table 7: Expenditure pattern of chemist goods (including health and beauty products), by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**100**	**18.5**	**98**	**12.3**	**99**	**8.0**	**100**	**4.4**	**100**	**3.5**	**47**
Newport Town Centre	**60**	**11.2**	**13**	**1.6**	**19**	**1.5**	**33**	**1.4**	**35**	**1.2**	**16.9**
Newport Town Centre	60	11.2	13	1.6	19	1.5	33	1.4	35	1.2	16.9
Newport Edge of Centre	**11**	**2.1**	**1**	**0.1**			**2**	**0.1**	**6**	**0.2**	**2.5**
Wakes Retail Park, Medina Way			0	0.0							0.0
Marks & Spencer, Church Litten											
Sainsburys Superstore, Foxes Road	7	1.3	0	0.0			1	0.0	3	0.1	1.5
Morrisons, South Street	4	0.7					1	0.0	3	0.1	0.8
Towngate Retail Park											
Lidl, River Way	0	0.1							1	0.0	0.1
Newport Out of Centre	**2**	**0.4**			**2**	**0.1**					**0.5**
B&Q, Dodnor Lane											
Carisbrooke Retail Park, Taylor Road	0	0.0									0.0
Asda, St Georges Way	1	0.3			2	0.1					0.4
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway											
Others	0	0.1									0
Cowes	**10**	**1.9**							**3**	**0.1**	**2.0**
Cowes Town Centre	10	1.9							3	0.1	2.0
The Range, Place Road											
Aldi, Airfield Way	0	0.0									0.0
Others											
East Cowes	**10**	**1.9**	**0**	**0.0**							**1.9**
East Cowes Town Centre	10	1.9	0	0.0							1.9
Ryde	**1**	**0.2**	**69**	**8.7**	**6**	**0.5**			**1**	**0.0**	**9.5**
Ryde Town Centre	1	0.1	52	6.5	2	0.2			1	0.0	6.9
Tesco Extra, Brading Road	1	0.1	17	2.1	4	0.3					2.6
Others											
Sandown	**1**	**0.1**	**1**	**0.2**	**33**	**2.7**	**4**	**0.2**			**3.1**
Sandown Town Centre					26	2.1					2.1
Morrisons, Newport Road	0	0.1			5	0.4	4	0.2			0.7
Aldi, Spithead Bus Park	0	0.1	1	0.2	2	0.1					0.4
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others											
Shanklin	**0**	**0.0**	**1**	**0.1**	**36**	**2.9**	**8**	**0.3**			**3.4**
Shanklin Town Centre	0	0.0	1	0.1	36	2.9	8	0.3			3.4
Lidl, Landguard Manor Road					1	0.0					0.0
Ventnor	**0**	**0.1**					**51**	**2.2**			**2.3**
Ventnor Town Centre	0	0.1					51	2.2			2.3
Freshwater	**1**	**0.2**							**40**	**1.4**	**1.6**
Freshwater Town Centre	1	0.2							40	1.4	1.6
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight	**3**	**0.5**	**13**	**1.6**	**2**	**0.2**	**3**	**0.1**	**14**	**0.5**	**2.9**
OUTSIDE SURVEY AREA	**0**	**0.1**	**2**	**0.2**	**1**	**0.1**					**0**
Southampton	0	0.0	1	0.1							0.2
Portsmouth					1	0.0					0.0
Central London					0	0.0					0.0
Other	0	0.0	1	0.1							0.2
Total	**100**	**18.6**	**100**	**12.5**	**100**	**8.1**	**100**	**4.4**	**100**	**3.5**	**47.0**

Notes:
Market share figures derived from Question 13, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 8: Expenditure pattern of large household electrical items (white goods), by Zone, 2021

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Total Survey Derived Turnover (£m)
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**95**	**3.8**	**98**	**3.4**	**93**	**2.2**	**97**	**1.4**	**99**	**1.4**	**12.2**
Newport Town Centre	**27**	**1.1**	**12**	**0.4**							**1.5**
Newport Town Centre	27	1.1	12	0.4							1.5
Newport Edge of Centre	**59**	**2.4**	**57**	**2.0**	**74**	**1.7**	**81**	**1.2**	**84**	**1.2**	**8.4**
Wakes Retail Park, Medina Way	59	2.4	57	2.0							4.3
Marks & Spencer, Church Litten											
Sainsburys Superstore, Foxes Road	1	0.0									0.0
Morrisons, South Street					13	0.3	33	0.5	14	0.2	1.0
Towngate Retail Park					61	1.4	49	0.7	70	1.0	3.1
Lidl, River Way											
Newport Out of Centre	**9**	**0.4**	**11**	**0.4**	**10**	**0.2**	**6**	**0.1**	**7**	**0.1**	**1.1**
B&Q, Dodnor Lane	1	0.0	1	0.0							0.1
Carisbrooke Retail Park, Taylor Road	4	0.2	3	0.1							0.3
Asda, St Georges Way	1	0.0			1	0.0					0.0
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway	3	0.1	6	0.2	3	0.1	5	0.1	2	0.0	0.5
Others			1	0.0	7	0.2	1	0.0	4	0.1	0.3
Cowes											
Cowes Town Centre											
The Range, Place Road											
Aldi, Airfield Way											
Others											
East Cowes	**0**	**0.0**									**0.0**
East Cowes Town Centre	0	0.0									0.0
Ryde	**0**	**0.0**	**18**	**0.6**	**3**	**0.1**	**3**	**0.0**	**5**	**0.1**	**0.8**
Ryde Town Centre	0	0.0	7	0.2							0.2
Tesco Extra, Brading Road			11	0.4							0.4
Others					3	0.1	3	0.0	5	0.1	0.2
Sandown					**2**	**0.0**	**3**	**0.0**	**1**	**0.0**	**0.1**
Sandown Town Centre					2	0.0	3	0.0	1	0.0	0.1
Morrisons, Newport Road											
Aldi, Spithead Bus Park											
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others											
Shanklin											
Shanklin Town Centre											
Lidl, Landguard Manor Road											
Ventnor											
Ventnor Town Centre											
Freshwater									**3**	**0.0**	**0.0**
Freshwater Town Centre									3	0.0	0.0
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight					**6**	**0.1**	**7**	**0.1**			**0.2**
OUTSIDE SURVEY AREA	**5**	**0.2**	**2**	**0.1**	**5**	**0.1**					**0.4**
Southampton	4	0.2	1	0.0	1	0.0					0.2
Portsmouth			0	0.0	1	0.0					0.0
Central London	0	0.0	1	0.0							0.0
Other	0	0.0			4	0.1					0.1
Total	**100**	**4.0**	**100**	**3.4**	**100**	**2.3**	**100**	**1.4**	**100**	**1.4**	**12.7**

Notes:
Market share figures derived from Question 14, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 9: Expenditure pattern of small electrical goods (cameras, tablets, hairdryers, blenders), by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**95**	**16.4**	**98**	**12.1**	**96**	**7.5**	**99**	**4.0**	**100**	**3.3**	**43.4**
Newport Town Centre	**32**	**5.6**	**14**	**1.7**	**16**	**1.3**	**30**	**1.2**	**18**	**0.6**	**10.3**
Newport Town Centre	32	5.6	14	1.7	16	1.3	30	1.2	18	0.6	10.3
Newport Edge of Centre	**44**	**7.6**	**42**	**5.2**	**46**	**3.6**	**43**	**1.8**	**55**	**1.8**	**20.0**
Wakes Retail Park, Medina Way	35	6.0	40	5.0	41	3.2	40	1.7	44	1.5	17.4
Marks & Spencer, Church Litten											
Sainsburys Superstore, Foxes Road	8	1.4	0	0.1	3	0.2	2	0.1	4	0.1	1.9
Morrisons, South Street	1	0.2	1	0.1	1	0.1			5	0.2	0.5
Towngate Retail Park											
Lidl, River Way	0	0.1	0	0.1	1	0.0			3	0.1	0.2
Newport Out of Centre	**14**	**2.4**	**5**	**0.7**	**10**	**0.8**	**6**	**0.3**	**7**	**0.2**	**4.3**
B&Q, Dodnor Lane			0	0.1					1	0.0	0.1
Carisbrooke Retail Park, Taylor Road	11	2.0	3	0.4	8	0.6	4	0.2	6	0.2	3.3
Asda, St Georges Way	3	0.5	0	0.1	1	0.1	1	0.1			0.6
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway			1	0.2	1	0.1	1	0.1			0.3
Others											
Cowes	**3**	**0.6**	**0**	**0.1**					**2**	**0.1**	**0.7**
Cowes Town Centre	3	0.5	0	0.1							0.6
The Range, Place Road	0	0.1									0.1
Aldi, Airfield Way									2	0.1	0.1
Others											
East Cowes											
East Cowes Town Centre											
Ryde	**1**	**0.2**	**36**	**4.5**	**10**	**0.8**	**12**	**0.5**			**5.9**
Ryde Town Centre			12	1.5	2	0.2	2	0.1			1.7
Tesco Extra, Brading Road	1	0.2	25	3.1	8	0.6	9	0.4			4.2
Others											
Sandown					**3**	**0.2**					**0.2**
Sandown Town Centre					1	0.0					0.0
Morrisons, Newport Road											
Aldi, Spithead Bus Park					2	0.2					0.2
Lake Industrial Estate, Lake Industrial Way											
Spithead Business Centre, Newport Road											
Others											
Shanklin					**12**	**0.9**	**1**	**0.1**			**1.0**
Shanklin Town Centre					11	0.9	1	0.1			0.9
Lidl, Landguard Manor Road					1	0.0					0.0
Ventnor							**7**	**0.3**			**0.3**
Ventnor Town Centre							7	0.3			0.3
Freshwater									**18**	**0.6**	**0.6**
Freshwater Town Centre									18	0.6	0.6
Honnor & Jeffrey Afton Garden Centre, Afton Road											
Other on the Isle of Wight											
OUTSIDE SURVEY AREA	**5**	**0.9**	**2**	**0.3**	**4**	**0.3**	**1**	**0.1**			**1.6**
Southampton	5	0.8	1	0.1	2	0.2	1	0.1			1.2
Portsmouth											
Central London	0	0.1	1	0.1	1	0.0					0.2
Other	0	0.1	0	0.1	1	0.1					0.2
Total	**100**	**17.3**	**100**	**12.4**	**100**	**7.9**	**100**	**4.1**	**100**	**3.3**	**45.0**

Notes:
Market share figures derived from Question 15, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 10: Expenditure pattern of furniture, carpets and floor coverings, by Zone, 2021

	Zone										Total Survey
	1		2		3		4		5		Derived
	%	£m	%	£m	%	£m	%	£m	%	£m	Turnover (£m)
ISLE OF WIGHT STUDY AREA	**87**	**9.5**	**82**	**7.0**	**88**	**4.6**	**95**	**2.7**	**95**	**2.3**	**26.1**
Newport Town Centre	**43**	**4.7**	**18**	**1.6**	**15**	**0.8**	**55**	**1.6**	**26**	**0.6**	**9.3**
Newport Town Centre	43	4.7	18	1.6	15	0.8	55	1.6	26	0.6	9.3
Newport Edge of Centre	**6**	**0.7**	**5**	**0.4**	**6**	**0.3**	**2**	**0.1**	**9**	**0.2**	**1.7**
Wakes Retail Park, Medina Way	5	0.6	4	0.3	4	0.2	2	0.1	7	0.2	1.4
Marks & Spencer, Church Litten	1	0.1	1	0.1	1	0.1			2	0.0	0.3
Sainsburys Superstore, Foxes Road											
Morrisons, South Street											
Towngate Retail Park											
Lidl, River Way											
Newport Out of Centre	**25**	**2.8**	**15**	**1.3**	**23**	**1.2**	**17**	**0.5**	**22**	**0.5**	**6.3**
B&Q, Dodnor Lane	5	0.5	2	0.2	3	0.1	6	0.2	5	0.1	1.1
Carisbrooke Retail Park, Taylor Road	15	1.7	12	1.0	15	0.8	7	0.2	12	0.3	3.9
Asda, St Georges Way											
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway	5	0.5	1	0.1	4	0.2	4	0.1	5	0.1	1.1
Others	0	0.0			2	0.1					0.1
Cowes	**3**	**0.3**									**0.3**
Cowes Town Centre	3	0.3									0.3
The Range, Place Road	0	0.0									0.0
Aldi, Airfield Way											
Others											
East Cowes											
East Cowes Town Centre											
Ryde	**3**	**0.3**	**31**	**2.6**	**6**	**0.3**	**4**	**0.1**	**3**	**0.1**	**3.4**
Ryde Town Centre	3	0.3	31	2.6	6	0.3	4	0.1	3	0.1	3.4
Tesco Extra, Brading Road											
Others											
Sandown	**2**	**0.3**	**7**	**0.6**	**18**	**1.0**	**6**	**0.2**			**2.0**
Sandown Town Centre	0	0.0	4	0.3	11	0.6	6	0.2			1.1
Morrisons, Newport Road											
Aldi, Spithead Bus Park	0	0.0									0.0
Lake Industrial Estate, Lake Industrial Way	1	0.2	1	0.1	5	0.3					0.6
Spithead Business Centre, Newport Road	0	0.0	2	0.2	2	0.1					0.3
Others											
Shanklin			**2**	**0.2**	**16**	**0.8**	**7**	**0.2**			**1.2**
Shanklin Town Centre			2	0.2	16	0.8	7	0.2			1.2
Lidl, Landguard Manor Road											
Ventnor	**0**	**0.0**									**0.0**
Ventnor Town Centre	0	0.0									0.0
Freshwater	**3**	**0.3**							**36**	**0.9**	**1.2**
Freshwater Town Centre	2	0.2							36	0.9	1.1
Honnor & Jeffrey Afton Garden Centre, Afton Road	1	0.1									0.1
Other on the Isle of Wight	**1**	**0.1**	**4**	**0.3**	**4**	**0.2**	**4**	**0.1**			**0.7**
OUTSIDE SURVEY AREA	**13**	**1.4**	**18**	**1.5**	**12**	**0.6**	**5**	**0.1**	**5**	**0.1**	**3.7**
Southampton	10	1.1	13	1.1	10	0.5			3	0.1	2.8
Portsmouth	1	0.1			1	0.0					0.1
Central London	1	0.1	3	0.3							0.3
Other	1	0.1	1	0.1	2	0.1	5	0.1	2	0.0	0.5
Total	**100**	**10.9**	**100**	**8.5**	**100**	**5.2**	**100**	**2.8**	**100**	**2.5**	**29.9**

Notes:
Market share figures derived from Question 16, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 11: Expenditure pattern of DIY (including gardening) goods, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**99**	**8.8**	**100**	**6.5**	**100**	**4.0**	**99**	**2.6**	**100**	**2.2**	**24.2**
Newport Town Centre	**17**	**1.5**	**7**	**0.5**	**7**	**0.3**	**14**	**0.4**	**4**	**0.1**	**2.7**
Newport Town Centre	17	1.5	7	0.5	7	0.3	14	0.4	4	0.1	2.7
Newport Edge of Centre	**2**	**0.2**			**1**	**0.0**					**0.2**
Wakes Retail Park, Medina Way	2	0.1			1	0.0					0.2
Marks & Spencer, Church Litten											
Sainsburys Superstore, Foxes Road											
Morrisons, South Street											
Towngate Retail Park											
Lidl, River Way	0	0.0									0.0
Newport Out of Centre	**71**	**6.3**	**72**	**4.7**	**66**	**2.7**	**67**	**1.7**	**77**	**1.7**	**17.2**
B&Q, Dodnor Lane	68	6.0	66	4.3	65	2.6	65	1.7	76	1.7	16.3
Carisbrooke Retail Park, Taylor Road			0	0.0			1	0.0			0.1
Asda, St Georges Way			0	0.0							0.0
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway	2	0.2	5	0.3	1	0.0			1	0.0	0.6
Others	1	0.1	0	0.0			1	0.0			0.2
Cowes	**5**	**0.5**	**1**	**0.1**					**3**	**0.1**	**0.6**
Cowes Town Centre	5	0.4									0.4
The Range, Place Road	0	0.0	1	0.1					3	0.1	0.2
Aldi, Airfield Way											
Others											
East Cowes	**0**	**0.0**									**0.0**
East Cowes Town Centre	0	0.0									0.0
Ryde	**1**	**0.1**	**16**	**1.1**	**2**	**0.1**	**1**	**0.0**	**1**	**0.0**	**1.3**
Ryde Town Centre	1	0.1	12	0.8	1	0.0					0.9
Tesco Extra, Brading Road											
Others			5	0.3	1	0.0	1	0.0	1	0.0	0.4
Sandown	**1**	**0.1**	**1**	**0.0**	**10**	**0.4**	**3**	**0.1**			**0.6**
Sandown Town Centre	0	0.0	0	0.0	5	0.2	1	0.0			0.3
Morrisons, Newport Road					1	0.0					0.0
Aldi, Spithead Bus Park					2	0.1	1	0.0			0.1
Lake Industrial Estate, Lake Industrial Way							1	0.0			0.0
Spithead Business Centre, Newport Road											
Others	1	0.1	0	0.0	3	0.1					0.2
Shanklin			**0**	**0.0**	**13**	**0.5**	**3**	**0.1**			**0.6**
Shanklin Town Centre			0	0.0	12	0.5	3	0.1			0.6
Lidl, Landguard Manor Road					1	0.0					0.0
Ventnor							**10**	**0.3**			**0.3**
Ventnor Town Centre							10	0.3			0.3
Freshwater	**1**	**0.0**							**16**	**0.4**	**0.4**
Freshwater Town Centre	0	0.0							13	0.3	0.3
Honnor & Jeffrey Afton Garden Centre, Afton Road	0	0.0							3	0.1	0.1
Other on the Isle of Wight	**1**	**0.1**	**2**	**0.1**	**1**	**0.0**	**1**	**0.0**			**0.3**
OUTSIDE SURVEY AREA	**1**	**0.0**					**1**	**0.0**			**0.1**
Southampton	0	0.0									0.0
Portsmouth											
Central London											
Other	0	0.0					1	0.0			0.0
Total	**100**	**8.8**	**100**	**6.5**	**100**	**4.0**	**100**	**2.6**	**100**	**2.2**	**24.2**

Notes:
Market share figures derived from Question 17, Isle of Wight Household Shoppers Survey undertaken by NEMS in January 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 12: Comparison Goods Expenditure Pattern - Bulky Goods, by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**93**	**22.1**	**92**	**16.9**	**94**	**10.8**	**98**	**6.7**	**98**	**6.0**	**62.6**
Newport Town Centre	**31**	**7.3**	**13**	**2.4**	**10**	**1.1**	**28**	**1.9**	**12**	**0.7**	**13.5**
Newport Town Centre	31	7.3	13	2.4	10	1.1	28	1.9	12	0.7	13.5
Newport Edge of Centre	**14**	**3.2**	**13**	**2.4**	**17**	**2.0**	**18**	**1.2**	**23**	**1.4**	**10.3**
Wakes Retail Park, Medina Way	13	3.1	12	2.3	2	0.2	1	0.1	3	0.2	5.8
Marks & Spencer, Church Litten	0	0.1	0	0.1	1	0.1			1	0.0	0.3
Sainsburys Superstore, Foxes Road	0	0.0									0.0
Morrisons, South Street					3	0.3	7	0.5	3	0.2	1.0
Towngate Retail Park					12	1.4	10	0.7	16	1.0	3.1
Lidl, River Way	0	0.0									0.0
Newport Out of Centre	**40**	**9.4**	**35**	**6.4**	**36**	**4.1**	**34**	**2.3**	**38**	**2.3**	**24.6**
B&Q, Dodnor Lane	27	6.5	25	4.5	24	2.8	27	1.9	30	1.8	17.5
Carisbrooke Retail Park, Taylor Road	8	1.9	6	1.1	7	0.8	3	0.2	5	0.3	4.3
Asda, St Georges Way	0	0.0	0	0.0	0	0.0					0.1
Matalan, Furrlongs											
Riverway Industrial Estate, Riverway	4	0.9	3	0.6	3	0.3	2	0.2	3	0.2	2.2
Others	1	0.2	0	0.0	2	0.2	1	0.0	1	0.1	0.6
Cowes	**3**	**0.8**	**1**	**0.1**					**1**	**0.1**	**1.0**
Cowes Town Centre	3	0.7									0.7
The Range, Place Road	0	0.1	1	0.1					1	0.1	0.2
Aldi, Airfield Way											
Others											
East Cowes	**0**	**0.0**									**0.0**
East Cowes Town Centre	0	0.0									0.0
Ryde	**2**	**0.4**	**23**	**4.3**	**4**	**0.5**	**2**	**0.2**	**3**	**0.2**	**5.5**
Ryde Town Centre	2	0.4	20	3.6	3	0.4	1	0.1	1	0.1	4.6
Tesco Extra, Brading Road			2	0.4							0.4
Others			2	0.3	1	0.1	1	0.1	1	0.1	0.6
Sandown	**2**	**0.4**	**4**	**0.7**	**12**	**1.4**	**4**	**0.3**	**0**	**0.0**	**2.7**
Sandown Town Centre	0	0.1	2	0.3	7	0.8	4	0.3	0	0.0	1.5
Morrisons, Newport Road					0	0.0					0.0
Aldi, Spithead Bus Park	0	0.0			1	0.1	0	0.0			0.2
Lake Industrial Estate, Lake Industrial Way	1	0.2	1	0.1	2	0.3	0	0.0			0.6
Spithead Business Centre, Newport Road	0	0.0	1	0.2	1	0.1					0.3
Others	0	0.1	0	0.0	1	0.1					0.2
Shanklin			**1**	**0.2**	**11**	**1.3**	**4**	**0.3**			**1.8**
Shanklin Town Centre			1	0.2	11	1.3	4	0.3			1.8
Lidl, Landguard Manor Road					0	0.0					0.0
Ventnor	**0**	**0.0**					**4**	**0.3**			**0.3**
Ventnor Town Centre	0	0.0					4	0.3			0.3
Freshwater	**1**	**0.3**							**21**	**1.3**	**1.6**
Freshwater Town Centre	1	0.2							20	1.2	1.4
Honnor & Jeffrey Afton Garden Centre, Afton Road	1	0.2							1	0.1	0.2
Other on the Isle of Wight	**1**	**0.2**	**2**	**0.5**	**3**	**0.4**	**4**	**0.3**			**1.2**
OUTSIDE SURVEY AREA	**7**	**1.6**	**8**	**1.6**	**6**	**0.7**	**2**	**0.2**	**2**	**0.1**	**4.2**
Southampton	5	1.3	6	1.1	4	0.5			1	0.1	3.0
Portsmouth	0	0.1	0	0.0	0	0.1					0.2
Central London	0	0.1	1	0.3							0.4
Other	1	0.1	1	0.1	1	0.2	2	0.2	1	0.0	0.6
Total	**100**	**23.7**	**100**	**18.5**	**100**	**11.5**	**100**	**6.9**	**100**	**6.1**	**66.8**

Notes:
Derived from Tables 8, 10, 11, 12
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 13: Comparison Goods Expenditure Pattern - Non-Bulky Goods (excluding Clothing & Footwear), by Zone, 2021

	Zone										Total Survey Derived Turnover (£m)
	1		2		3		4		5		
	%	£m	%	£m	%	£m	%	£m	%	£m	
ISLE OF WIGHT STUDY AREA	**94**	**91.9**	**95**	**66.4**	**95**	**41.7**	**95**	**23.4**	**97**	**19.8**	**243.3**
Newport Town Centre	**55**	**54.3**	**28**	**19.3**	**30**	**13.3**	**40**	**9.9**	**37**	**7.6**	**104.4**
Newport Town Centre	55	54.3	28	19.3	30	13.3	40	9.9	37	7.6	104.4
Newport Edge of Centre	**19**	**18.5**	**13**	**9.3**	**15**	**6.6**	**14**	**3.5**	**22**	**4.5**	**42.4**
Wakes Retail Park, Medina Way	9	8.9	11	7.6	11	4.9	10	2.5	13	2.7	26.5
Marks & Spencer, Church Litten	1	0.5	0	0.3	1	0.4	1	0.3	2	0.4	1.9
Sainsburys Superstore, Foxes Road	6	5.9	1	0.4	1	0.6	2	0.4	3	0.7	7.9
Morrisons, South Street	2	2.1	0	0.3	1	0.5	1	0.2	2	0.4	3.5
Towngate Retail Park	1	0.9	1	0.7	0	0.1	0	0.1	1	0.1	2.1
Lidl, River Way	0	0.2	0	0.1	0	0.0			1	0.2	0.5
Newport Out of Centre	**7**	**6.9**	**3**	**2.0**	**6**	**2.8**	**8**	**1.9**	**6**	**1.2**	**14.9**
B&Q, Dodnor Lane	0	0.2	0	0.2	0	0.1			1	0.1	0.6
Carisbrooke Retail Park, Taylor Road	5	4.8	1	0.9	5	2.0	6	1.5	4	0.9	10.2
Asda, St Georges Way	2	1.5	1	0.3	1	0.4	1	0.2	0	0.1	2.5
Matalan, Furrlongs	0	0.2			0	0.0	0	0.1			0.3
Riverway Industrial Estate, Riverway	0	0.1	1	0.4	0	0.2	0	0.1	0	0.0	0.7
Others	0	0.1	0	0.2	0	0.1	0	0.0	0	0.1	0.5
Cowes	**7**	**6.9**	**2**	**1.2**	**1**	**0.4**	**1**	**0.2**	**6**	**1.3**	**9.9**
Cowes Town Centre	6	5.7	1	0.7	1	0.2	1	0.2	6	1.2	8.0
The Range, Place Road	1	0.6	1	0.4	0	0.1					1.1
Aldi, Airfield Way	1	0.6							0	0.1	0.6
Others											
East Cowes	**2**	**2.1**	**0**	**0.0**	**0**	**0.2**			**1**	**0.1**	**2.4**
East Cowes Town Centre	2	2.1	0	0.0	0	0.2			1	0.1	2.4
Ryde	**2**	**1.8**	**45**	**31.2**	**10**	**4.4**	**4**	**1.0**	**1**	**0.2**	**38.6**
Ryde Town Centre	1	0.9	26	18.1	3	1.2	1	0.3	0	0.1	20.6
Tesco Extra, Brading Road	1	0.7	18	12.7	7	3.1	3	0.7	1	0.1	17.3
Others											
Sandown	**0**	**0.4**	**1**	**0.4**	**10**	**4.6**	**3**	**0.6**	**0**	**0.0**	**6.0**
Sandown Town Centre	0	0.0	0	0.1	7	3.0	0	0.1	0	0.0	3.2
Morrisons, Newport Road	0	0.1	0	0.1	3	1.2	2	0.5			1.8
Aldi, Spithead Bus Park	0	0.1	0	0.2	1	0.3	0	0.1			0.6
Lake Industrial Estate, Lake Industrial Way	0	0.2	0	0.0	0	0.0					0.2
Spithead Business Centre, Newport Road	0	0.0			0	0.1					0.1
Others											
Shanklin	**0**	**0.1**	**1**	**0.9**	**21**	**9.1**	**8**	**2.0**			**12.1**
Shanklin Town Centre	0	0.1	1	0.9	20	8.8	8	2.0			11.8
Lidl, Landguard Manor Road					1	0.3					0.3
Ventnor	**0**	**0.2**			**0**	**0.0**	**17**	**4.1**	**0**	**0.0**	**4.3**
Ventnor Town Centre	0	0.2			0	0.0	17	4.1	0	0.0	4.3
Freshwater	**0**	**0.4**							**20**	**4.0**	**4.4**
Freshwater Town Centre	0	0.4							19	3.8	4.2
Honnor & Jeffrey Afton Garden Centre, Afton Road									1	0.1	0.1
Other on the Isle of Wight	**1**	**0.5**	**3**	**2.1**	**0**	**0.2**	**1**	**0.1**	**4**	**0.8**	**3.8**
OUTSIDE SURVEY AREA	**6**	**5.9**	**5**	**3.4**	**5**	**2.1**	**5**	**1.2**	**3**	**0.6**	**13.2**
Southampton	4	3.7	3	1.8	3	1.2	4	0.9	3	0.6	8.2
Portsmouth	0	0.3	1	0.6	0	0.1	0	0.0			1.1
Central London	0	0.3	0	0.2	0	0.1	0	0.1			0.7
Other	2	1.6	1	0.7	2	0.7	1	0.2			3.3
Total	**100**	**97.8**	**100**	**69.7**	**100**	**44**	**100**	**24.6**	**100**	**20**	**256.6**

Notes:
Derived from Tables 2, 3, 4, 5, 6, 7, 9
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

ISLE OF WIGHT COUNCIL
RETAIL STUDY UPDATE 2021

Table 14: Comparison Goods Expenditure Pattern - Combined, by Zone, 2021

	Zone 1 %	Zone 1 £m	Zone 2 %	Zone 2 £m	Zone 3 %	Zone 3 £m	Zone 4 %	Zone 4 £m	Zone 5 %	Zone 5 £m	Total Survey Derived Turnover (£m)	Inflow (%)	Inflow £m)
ISLE OF WIGHT STUDY AREA	**92**	**148.7**	**92**	**108.0**	**94**	**69.6**	**95**	**39.3**	**95**	**33.4**	**399.0**		
Newport Town Centre	**53**	**86.8**	**30**	**35.0**	**33**	**24.3**	**42**	**17.3**	**40**	**14.1**	**177.4**		
Newport Town Centre	53	86.8	30	35.0	33	24.3	42	17.3	40	14.1	177.4	10	17.7
Newport Edge of Centre	**16**	**26.2**	**13**	**15.8**	**15**	**10.9**	**16**	**6.5**	**20**	**7.1**	**66.5**		
Wakes Retail Park, Medina Way	7	11.9	8	9.9	7	5.2	6	2.6	8	2.8	32.4		
Marks & Spencer, Church Litten	2	3.6	4	4.3	3	2.5	4	1.8	3	1.1	13.2		
Sainsburys Superstore, Foxes Road	5	7.4	1	0.6	1	0.9	2	0.6	3	1.1	10.7		
Morrisons, South Street	1	2.1	0	0.3	1	0.8	2	0.7	2	0.6	4.5		
Towngate Retail Park	1	0.9	1	0.7	2	1.6	2	0.8	3	1.2	5.2		
Lidl, River Way	0	0.2	0	0.1	0	0.0			1	0.3	0.6		
Newport Out of Centre	**12**	**19.2**	**8**	**9.3**	**11**	**8.4**	**12**	**5.1**	**11**	**3.9**	**45.9**		
B&Q, Dodnor Lane	4	6.7	4	4.7	4	3.0	5	1.9	5	1.9	18.2		
Carisbrooke Retail Park, Taylor Road	4	6.7	2	2.5	4	2.8	5	2.2	3	1.2	15.3		
Asda, St Georges Way	2	2.7	0	0.4	1	0.6	1	0.4	0	0.1	4.2		
Matalan, Furrlongs	1	1.7	0	0.3	2	1.2	1	0.2	1	0.3	3.7		
Riverway Industrial Estate, Riverway	1	0.9	1	1.0	1	0.5	1	0.2	1	0.2	2.9		
Others	0	0.4	0	0.4	0	0.3	1	0.2	0	0.1	1.5		
Cowes	**5**	**8.9**	**1**	**1.7**	**1**	**0.4**	**1**	**0.2**	**4**	**1.3**	**12.5**		
Cowes Town Centre	5	7.4	1	1.1	0	0.2	1	0.2	3	1.2	10.2	10	1.0
The Range, Place Road	0	0.6	0	0.5	0	0.1			0	0.1	1.3		
Aldi, Airfield Way	0	0.7							0	0.1	0.7		
Others	0	0.2	0	0.1							0.3		
East Cowes	**1**	**2.2**	**0**	**0.0**	**0**	**0.2**			**0**	**0.1**	**2.6**		
East Cowes Town Centre	1	2.2	0	0.0	0	0.2			0	0.1	2.6	5	0.1
Ryde	**2**	**2.9**	**35**	**41.3**	**8**	**6.1**	**3**	**1.3**	**1**	**0.4**	**52.1**		
Ryde Town Centre	1	1.7	23	27.4	3	2.3	1	0.4	0	0.1	31.8	10	3.2
Tesco Extra, Brading Road	1	1.1	11	13.3	5	3.5	2	0.8	0	0.1	18.9		
Others	0	0.1	1	0.7	0	0.3	0	0.2	0	0.1	1.3		
Sandown	**0**	**0.7**	**1**	**1.0**	**10**	**7.1**	**2**	**1.0**	**0**	**0.0**	**9.9**		
Sandown Town Centre	0	0.1	0	0.4	6	4.7	1	0.3	0	0.0	5.6	10	0.6
Morrisons, Newport Road	0	0.1	0	0.1	2	1.2	1	0.5			1.8		
Aldi, Spithead Bus Park	0	0.1	0	0.2	1	0.4	0	0.1			0.8		
Lake Industrial Estate, Lake Industrial Way	0	0.3	0	0.2	0	0.3	0	0.0			0.8		
Spithead Business Centre, Newport Road	0	0.1	0	0.2	0	0.2					0.4		
Others	0	0.1	0	0.0	0	0.3	0	0.0			0.5		
Shanklin	**0**	**0.1**	**1**	**1.1**	**15**	**11.3**	**7**	**2.9**			**15.4**		
Shanklin Town Centre	0	0.1	1	1.1	15	11.0	7	2.7			14.9	10	1.5
Lidl, Landguard Manor Road					0	0.4	0	0.1			0.5		
Ventnor	**0**	**0.2**			**0**	**0.3**	**11**	**4.7**	**0**	**0.0**	**5.3**		
Ventnor Town Centre	0	0.2			0	0.3	11	4.7	0	0.0	5.3	10	0.5
Freshwater	**0**	**0.7**							**16**	**5.6**	**6.3**		
Freshwater Town Centre	0	0.6							15	5.4	5.9	5	0.3
Honnor & Jeffrey Afton Garden Centre, Afton Road	0	0.2							1	0.2	0.4		
Other on the Isle of Wight	**0**	**0.7**	**2**	**2.7**	**1**	**0.6**	**1**	**0.4**	**2**	**0.8**	**5.2**		
OUTSIDE SURVEY AREA	**8**	**13.7**	**8**	**9.3**	**6**	**4.3**	**5**	**2.0**	**5**	**1.7**	**31.0**		
Southampton	5	8.0	4	4.2	3	2.3	3	1.1	3	1.1	16.7		
Portsmouth	1	1.3	2	2.7	0	0.3	1	0.3	0	0.1	4.7		
Central London	0	0.7	1	0.8	1	0.4	0	0.2			2.1		
Other	2	3.7	1	1.6	2	1.3	1	0.5	1	0.4	7.5		
Total	**100**	**162.4**	**100**	**117.3**	**100**	**73.9**	**100**	**41.3**	**100**	**35.1**	**430.07**		

Notes:
Derived from Table 13
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2019 Prices

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TABLE 15: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN NEWPORT

Table 15a: Estimated 'Capacity' for Comparison Goods Facilities in Newport

Year	Benchmark Turnover £m[1]	Newport Turnover - £m[2]	Newport Inflow - £m	Surplus Expenditure - £m
2021	307.6	289.9	17.7	0.0
2023	331.1	318.1	19.5	6.5
2028	382.3	363.3	22.2	3.2
2031	412.9	394.9	24.2	6.2
2034	446.0	430.5	26.4	10.9
Market Share	**67.4**			

Notes:
1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Newport facilities from Study Area
2019 prices

Table 15b: Quantitative Need for Additional Comparison Goods Floorspace in Newport

Year	Surplus £m	Floorspace Requirement (sq m net)
2021	0.0	0
2023	6.5	1,500
2028	3.2	600
2031	6.2	1,100
2034	10.9	1,800

Notes:
1. Average sales density assumed to be circa £4,120 per sq.m (@2021)
2019 prices

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TABLE 16: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN COWES

Table 16a: Estimated 'Capacity' for Comparison Goods Facilities in Cowes

Year	Benchmark Turnover £m[1]	Cowes Turnover - £m[2]	Cowes Inflow - £m	Surplus Expenditure - £m
2021	13.5	12.5	1.0	0.0
2023	14.6	13.8	1.1	0.3
2028	16.8	15.7	1.3	0.1
2031	18.2	17.1	1.4	0.3
2034	19.6	18.6	1.5	0.5

Notes:
1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Cowes from Study Area
2019 prices

Table 16b: Quantitative Need for Additional Comparison Goods Floorspace in Cowes

Year	Surplus	Floorspace Requirement
	£m	Min[1]
2021	0.0	0
2023	0.3	100
2028	0.1	0
2031	0.3	100
2034	0.5	100

Notes:
1. Average sales density assumed to be circa £3,875 per sq.m (@2021)
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2019 prices

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TABLE 17: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN EAST COWES

Table 17a: Estimated 'Capacity' for Comparison Goods Facilities in East Cowes

Year	Benchmark Turnover £m[1]	East Cowes Turnover - £m[2]	East Cowes Inflow - £m	Surplus Expenditure - £m
2021	2.7	2.6	0.1	0.0
2023	2.9	2.8	0.1	0.1
2028	3.3	3.2	0.2	0.0
2031	3.6	3.5	0.2	0.1
2034	3.9	3.8	0.2	0.1

Notes:
1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by East Cowes from Study Area
2019 prices

Table 17b: Quantitative Need for Additional Comparison Goods Floorspace in East Cowes

Year	Surplus £m	Floorspace Requirement
2021	0.0	0
2023	0.1	0
2028	0.0	0
2031	0.1	0
2034	0.1	0

Notes:
1. Average sales density assumed to be circa £3,875 per sq.m (@2021)
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2019 prices

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TABLE 18: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN RYDE

Table 18a: Estimated 'Capacity' for Comparison Goods Facilities in Ryde

Year	Benchmark Turnover £m[1]	Ryde Turnover - £m[2]	Ryde Inflow - £m	Surplus Expenditure - £m
2021	55.2	52.1	3.2	0.0
2023	59.5	57.1	3.5	1.2
2028	68.7	65.3	4.0	0.6
2031	74.2	70.9	4.3	1.1
2034	80.1	77.3	4.7	2.0

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Ryde from Study Area

2019 prices

Table 18b: Quantitative Need for Additional Comparison Goods Floorspace in Ryde

Year	Surplus £m	Floorspace Requirement
2021	0.0	0
2023	1.2	300
2028	0.6	100
2031	1.1	200
2034	2.0	300

Notes:

1. Average sales density assumed to be circa £3,875 per sq.m (@2021)

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).

2019 prices

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TABLE 19: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN SANDOWN

Table 19a: Estimated 'Capacity' for Comparison Goods Facilities in Sandown

Year	Benchmark Turnover £m[1]	Sandown Turnover - £m[2]	Sandown Inflow - £m	Surplus Expenditure - £m
2021	10.4	9.9	0.6	0.0
2023	11.2	10.8	0.6	0.2
2028	13.0	12.4	0.7	0.1
2031	14.0	13.4	0.8	0.2
2034	15.1	14.7	0.8	0.4

Notes:
1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Sandown from Study Area
2019 prices

Table 19b: Quantitative Need for Additional Comparison Goods Floorspace in Sandown

Year	Surplus £m	Floorspace Requirement
2021	0.0	0
2023	0.2	100
2028	0.1	0
2031	0.2	0
2034	0.4	100

Notes:
1. Average sales density assumed to be circa £3,875 per sq.m (@2021)
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2019 prices

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TABLE 20: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN SHANKLIN

Table 20a: Estimated 'Capacity' for Comparison Goods Facilities in Shanklin

Year	Benchmark Turnover £m[1]	Shanklin Turnover - £m[2]	Shanklin Inflow - £m	Surplus Expenditure - £m
2018	16.9	15.4	1.5	0.0
2023	18.2	16.9	1.6	0.4
2028	21.0	19.3	1.9	0.2
2031	22.6	20.9	2.0	0.3
2034	24.5	22.8	2.2	0.6

Notes:
1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Shanklin from Study Area
2019 prices

Table 20b: Quantitative Need for Additional Comparison Goods Floorspace in Shanklin

Year	Surplus £m	Floorspace Requirement (sq m net)
2018	0.0	0
2023	0.4	100
2028	0.2	0
2031	0.3	100
2034	0.6	100

Notes:
1. Average sales density assumed to be circa £3,875 per sq.m (@2021)
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2019 prices

Table 16c: Extant Comparison Goods Commitments in Shanklin

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Comparison Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Comparison Turnover (£m)
79-81 Regent Street, Shanklin	P/00458/18	change of use from auction house to retail shop	400	247	3,875	1.0
TOTAL				**247**		**1.0**

Notes:
List of commitments provided by Isle of Wight Council
Floorspace is taken from application documents
2019 prices

Table 16d: Net Quantitative Need for Additional Comparison Goods Floorspace in Brackley

Year	Surplus	Commitments	Residual	Floorspace
	£m	£m	£m	Min[1]
2018	0.0	1.0	-1.0	-200
2023	0.4	1.0	-0.7	-200
2028	0.2	1.2	-1.0	-200
2031	0.3	1.3	-0.9	-200
2034	0.6	1.4	-0.8	-100

Notes:
1. Average sales density assumed to be circa £3,875 per sq.m (@2021)
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
Residual calculated by subtracting turnover of commitments (sourced from Table 16c) from surplus expenditure (sourced from Table 16a).
2019 prices

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TABLE 21: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN VENTNOR

Table 21a: Estimated 'Capacity' for Comparison Goods Facilities in Ventnor

Year	Benchmark Turnover £m[1]	Ventnor Turnover - £m[2]	Ventnor Inflow - £m	Surplus Expenditure - £m
2021	5.8	5.3	0.5	0.0
2023	6.2	5.8	0.6	0.1
2028	7.2	6.6	0.7	0.1
2031	7.8	7.2	0.7	0.1
2034	8.4	7.8	0.8	0.2

Notes:
1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Ventnor from Study Area
2019 prices

Table 21b: Quantitative Need for Additional Comparison Goods Floorspace in Ventnor

Year	Surplus £m	Floorspace Requirement
2021	0.0	0
2023	0.1	0
2028	0.1	0
2031	0.1	0
2034	0.2	0

Notes:
1. Average sales density assumed to be circa £3,875 per sq.m (@2021)
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2019 prices

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TABLE 22: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN FRESHWATER

Table 22a: Estimated 'Capacity' for Comparison Goods Facilities in Freshwater

Year	Benchmark Turnover £m[1]	Freshwater Turnover - £m[2]	Freshwater Inflow - £m	Surplus Expenditure - £m
2021	6.6	6.3	0.3	0.0
2023	7.1	6.9	0.3	0.1
2028	8.2	7.9	0.4	0.1
2031	8.9	8.6	0.4	0.1
2034	9.6	9.4	0.4	0.2

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).
2. Assumes constant market share claimed by Freshwater from Study Area

2019 prices

Table 22b: Quantitative Need for Additional Comparison Goods Floorspace in Freshwater

Year	Surplus £m	Floorspace Requirement
2021	0.0	0
2023	0.1	0
2028	0.1	0
2031	0.1	0
2034	0.2	0

Notes:

1. Average sales density assumed to be circa £3,875 per sq.m (@2021)

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020).

2019 prices