



GVA
St Catherine's Court
Berkeley Place
Bristol
BS8 1BQ

Stroud Retail Study Update 2013

Stroud District Council

July 2013

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1. Introduction

- 1.1 GVA has been instructed by Stroud District Council ('SDC') to prepare an update to its Town Centres & Retailing Study (July 2010) ('the 2010 study'). This update study will supersede parts of the July 2010 study and will form part of the evidence base for the Stroud District Local Plan which is currently in preparation.
- 1.2 This update study concentrates upon three areas:
- A review of the changes in national retail and town centre policy since the completion of the 2010 study;
 - An updated assessment of quantitative need for retail floorspace across the main settlements in Stroud District; and
 - A review of the retail and town centre policies within the March/May 2013 policies consultation version of the Stroud District Local Plan.
- 1.3 As a consequence, parts of Sections 5, 6 and 7 of the 2010 study will be superseded by this study and the latter parts of this document explain which parts of the 2010 study are no longer relevant.
- 1.4 The remainder of this document is set out as follows:
- Section 2 summarises the change in national policy, from PPS4 to the National Planning Policy Framework ('the NPPF'), since the 2010 retail study;
 - In Section 3, the updated assessment of quantitative need for new convenience and comparison goods floorspace is outlined; and
 - In Section 4, we provide our review of the contents of retailing and town centre policies in the draft Local Plan and our recommendations for boundaries on the proposals maps.
- 1.5 All plans and statistical information can be found in appendices at the rear of this document.

2. Changes in Planning Policy Since 2010 Study

- 2.1 At the time of finalising the 2010 retail study, national planning policy on retailing and town centres was contained within Planning Policy Statement 4, published in December 2009. This PPS was supported by 'Practice Guidance on Need, Impact and the Sequential Approach', published at the same time.
- 2.2 In March 2012, the NPPF was published by the Department for Communities and Local Government and PPS4, amongst many other PPS's and PPG's, was superseded. However, the Practice Guidance remains extant and weight can be given to its contents insofar as they remain consistent with the NPPF.
- 2.3 The NPPF provides a slimmed-down version of national planning policy and in relation to retailing and town centres, the following is recommended in the context of plan-making:
- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
 - promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.4 These requirements do not differ in any significant material extent to the contents of PPS4 and it remains national policy for development plans to assess the need for new retail development and if a need is identified then to identify sites in accordance with the sequential approach. An additional requirement in the NPPF is the need to meet retail needs in full. There also remains a need for local planning authorities to define town centre and primary shopping area boundaries, and also shopping frontages.

2.5 Therefore, the context in which the 2010 study was prepared has not materially altered.

2.6 In the context of development management, the NPPF retains the main retail policy tests of impact and the sequential approach and continues the approach of excluding 'need' as a stand-alone retail planning policy test. However, the test of impact has been slimmed down with the five criteria in Policy EC16 of PPS4 (impact on: investment, vitality and viability, scale, financial impact and impact on the delivery of allocated sites) being replaced by just two criteria: impact on town centre investment and impact on town centre vitality and viability. However, this change does not fundamentally alter the long-standing national policy objective of aiming to protect and enhance town centres and ensuring that town centre investment is not jeopardised by out of centre proposals.

- 2.7 Also, in line with the approach started by PPS4, the NPPF retains clear guidance for local planning authorities when determining retail development proposals which lie outside of town centres and which are not in accordance with an up to date development plan:

“Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused”.

3. Updated Quantitative Need Assessment

- 3.1 This section, and supporting appendices, provide an update to (and supersede) part of section 5 of the 2010 study. In particular, we have carried out a new assessment of the quantitative need for new convenience and comparison goods floorspace within the main settlements in Stroud District.
- 3.2 This update assessment follows the same step by step methodology as the 2010 study¹ and also adopts the same study area and constituent zones (see plan at Appendix A to this report). In order to estimate current shopping patterns, we have utilised the results of a household survey conducted in April 2013², and which provides a more up-to-date set of shopping patterns data than the household survey commissioned for the 2010 study. This survey uses the same zones and geographic area as the 2010 study.
- 3.3 In order to match the work being undertaken for the Stroud District Local Plan, five separate capacity scenarios have been tested, which are based upon five contrasting population growth and housing development options in the Local Plan. The housing development scenarios are:

¹ See paragraph 5.4 of the 2010 study

² Used with the kind permission of the Property Alliance Group, who commissioned the survey

	9,500 dwellings in Stroud District			11,500 dwellings in Stroud District	
	Option A	Option B	Option C	Option A	Option B
Residual requirement	2400	2400	2400	4400	4400
Hunts Grove extension		500	500	750	0
North East Cam		500	500	750	0
Sharpness		250	250	250	0
Stroud Valleys		300	300	300	0
West of Stonehouse	1550	0	750	1500	3550
Council house programme	150	150	150	150	150
Windfall	750	750	0	750	750
TOTAL	2450	2450	2450	4450	4450

3.4 Like the 2010 study, population growth within those zones in the study area which fall within Stroud's administrative area has been calculated by apportioning the overall district-wide growth on the basis of: housing allocations, commitments and completions since 2011 (the date of the population base data, from the 2011 Census, for the study area zones). Therefore, the housing development options in the table above have then been added to completions and commitments since 2011 in order to estimate total growth in each zone.

3.5 In order to provide this updated quantitative need assessment, the following data sources and assumptions have been used:

- **Population.** This assessment uses the results of the 2011 Census and projects these forward on the basis of the future district-wide growth rates advised by the Council's population advisor (Keith Woodhead). We are advised that Option B within the 9,500 dwellings scenario is the current preferred scenario.
- **Current per capita expenditure, future growth rates and an allowance for special forms of trading.** Base per capita expenditure data for 2011 has been sought from Experian and growth/change post-2011 has been calculated using the forecasts within Experian Retail Planner Briefing Note 10.1 (October 2012).

- **Market share information.** As already noted, we have utilised the results of an April 2013³ telephone survey of housing shopping patterns. This survey sought shopping patterns in relation to convenience and comparison goods.
 - **Commitments.** Based upon data from SDC the only major unimplemented commitment for additional retail floorspace within Stroud District is an extension to the Tesco supermarket in Cam. This proposal will provide additional convenience and comparison goods floorspace. Other recent commitments such as the new Sainsburys in Dursley and the extension to the Sainsburys in Stroud have been implemented before the April 2013 survey.
 - **Special forms of trading.** A reduction has been made in base 2011 expenditure levels to take into account the influence of special forms of trading (i.e. mail order and internet shopping). In addition, the growth forecasts which have been used taken into account the influence of special forms of trading on the growth/change of spending in physical stores.
 - All monetary information is provided in 2011 prices.
- 3.6 All five floorspace capacity scenarios follow the same structure and therefore '9,500 dwellings Option B' is the only scenario provided with the full set of tables. See Appendix B for this assessment. For the other scenarios, only the summary capacity tables are provided at appendices C-F.
- 3.7 The capacity forecasts for convenience goods floorspace for the main settlements in Stroud District are summarised below. All figures indicate forecast capacity for net additional sales area (in square metres), in addition to existing floorspace. Where there is no figure provided for a particular year, this indicates that there is no forecast capacity for additional floorspace.

³ Commissioned by the Property Alliance Group, in support of a forthcoming retail proposal in the Stonehouse/Stroud area

Convenience goods floorspace capacity forecasts

9500 A	2016	2021	2026	2031
Stroud	373	818	1083	1485
Cam/Dursley			48	212
Nailsworth	292	369	429	505
Wotton	304	338	370	406
Stonehouse		41	71	142

9500 B	2016	2021	2026	2031
Stroud	344	725	1013	1386
Cam/Dursley		2	124	320
Nailsworth	292	366	429	504
Wotton	304	338	371	408
Stonehouse				26

9500 C	2016	2021	2026	2031
Stroud	347	731	1020	1396
Cam/Dursley			104	292
Nailsworth	289	359	422	494
Wotton	302	334	367	402
Stonehouse			22	72

11500 A	2016	2021	2026	2031
Stroud	340	729	1211	1654
Cam/Dursley			217	444
Nailsworth	287	357	444	524
Wotton	302	334	375	412
Stonehouse		10	90	165

11500 B	2016	2021	2026	2031
Stroud	371	804	1337	1828
Cam/Dursley			90	267
Nailsworth	287	358	446	527
Wotton	302	334	373	410
Stonehouse		86	218	343

3.8 The figures presented in the tables above are based upon the continuation of current market shares for convenience goods shopping into the future. When compared with the results of the 2010 study, which provided capacity forecasts up to 2026, the latest results do vary although the scale of difference for each of the main settlements is not significant in our opinion.

3.9 The 2010 study did go on to consider qualitative indicators and whether there was a need to plan for an alternate market share for each of the main settlements and we re-visit that assessment below:

- **Stroud.** The 2010 study found a good level and quality of convenience goods floorspace and no need to allocate sites for additional floorspace. Based on upon the latest quantitative assessment and the changes which have taken place since 2010, we see no reason to alter this view. Whilst the ability to provide for choice and competition should be supported, there remains no urgency to provide for a new supermarket and any proposals which do come forward should be tested against their impact on nearby town centres and subject to the sequential approach.
- **Stonehouse.** The relatively low levels of forecast convenience goods floorspace capacity remain, due to the level of leakage of trips out of Stonehouse to Stroud and Gloucester. In line with the 2010 study, the level of retail floorspace which should be provided within Stonehouse will be dependant on the level of new housing which is allocated to the town. Opportunities to stem leakage of shopping trips from the town should be explored, including opportunities for new convenience goods floorspace within Stonehouse which allows local residents to meet more of their needs within the town without having to travel to Stroud and elsewhere.
- **Dursley/Cam.** In the short to medium term there is no need for additional convenience goods floorspace within Cam and Dursley, which is unsurprising given the impact of the new Sainsburys store and the committed extension to the Tesco store in Cam. As a consequence, we foresee no reason to allocate additional convenience goods floorspace in the Cam and Dursley area.
- **Wotton-under-Edge.** The latest quantitative assessment confirms the (collective) good trading performance of convenience goods stores in Wotton which occurs alongside the leakage of main food shopping expenditure to other settlements in Stroud District and South Gloucestershire. In principle, the ability to improve retention rates could be supported, but we repeat the findings of the 2010 study in terms of the availability of sites for retail development and the need to protect the high street.
- **Nailsworth.** The quantitative capacity for additional convenience goods floorspace in Nailsworth remains modest and there remains a reasonably good level of provision for local residents. Leakage of convenience goods expenditure does occur and the

main beneficiary of this is Stroud, although we do not consider that a higher retention level would warrant the allocation of a new large store for the town. Instead, modest improvements to the town centre and existing facilities are recommended.

3.10 The same capacity forecast scenarios have been undertaken for comparison goods shopping in the main settlements are the results are summarised below.

Comparison goods floorspace capacity forecasts

9500 A	2016	2021	2026	2031
Stroud	371	1125	2215	3850
Cam/Dursley			85	329
Nailsworth	39	115	268	472
Wotton	12	32	77	134
Stonehouse				

9500 B	2016	2021	2026	2031
Stroud	327	943	2075	3634
Cam/Dursley			78	322
Nailsworth	41	119	275	482
Wotton	12	34	80	138
Stonehouse	25	72	153	267

9500 C	2016	2021	2026	2031
Stroud	333	959	2093	3662
Cam/Dursley			80	324
Nailsworth	38	108	263	464
Wotton	11	31	76	132
Stonehouse	36	104	188	320

11500 A	2016	2021	2026	2031
Stroud	327	969	2553	4298
Cam/Dursley			138	404
Nailsworth	36	106	299	512
Wotton	11	31	84	143
Stonehouse	40	121	278	448

11500 B	2016	2021	2026	2031
Stroud	363	1103	2807	4675
Cam/Dursley			146	411
Nailsworth	34	100	288	497
Wotton	10	29	81	139
Stonehouse	65	201	427	668

- 3.11 In a similar manner to the convenience goods assessment, there are differences between the 2010 and 2013 floorspace capacity forecasts although the differences are not significant. Once again, Stroud is the focus for the highest quantitative capacity given its current market share. The other main settlements across the district attract much more modest levels.
- 3.12 There are opportunities to improve the quality of comparison goods floorspace provision within each of the main town centres in the District, although realism is required in relation to the ability for the main towns to significantly improve their respective market shares. Stroud is the centre most likely to attract a noticeable level of new comparison goods floorspace and improve its market share, although actions to support this increase should only be supported where new provision can be placed within or as an extension to the town centre. In all cases, the level of net additional comparison goods floorspace capacity outlined above should be directed in the first instance to town centre locations, with edge and out of centre proposals tests against their impact on the health of nearby town centres.

4. Review of Retail and Town Centre Policies – March/May Policies Consultation Document

4.1 As part of this update study, SDC has requested that we examine:

- the draft retail and town centre policies in the March 2013 version of the Stroud District Local Plan;
- the town centre boundaries and shopping frontages within each of the main towns; and
- provide advice on the implications of the recent changes to permitted development rights to town centres in Stroud District.

The draft Stroud District Local Plan retail and town centre policies

4.2 With regards to Policy CP12 and its supporting text, we make the following recommendations:

- the supporting text to CP12 should indicate that primary and (where applicable) secondary shopping frontages have been defined and also how primary shopping areas (as per the NPPF definition) have been defined. Rather than repeating the generic definitions, reference can be made to the NPPF.
- With regards to criterion C in CP12, we recommend the addition of “...and not become destinations in their own right” to the final sentence.
- Criterion D should be revised in order to explain the sequence of locations for the sequential approach and also include reference to the need to assess retail proposals against their impact on defined town centres.
- Within criterion E(1), the definition of bulky goods should be defined.

- We recommend changing the phrase 'specialist shops' to 'specialist uses' in criterion E(2).

4.3 We note that Policy E17, which deals with primary shopping frontages, is a change from the adopted Local Plan Policy SH1 where qualitative criteria were applied to proposed changes of use from Class A1 (and the quantitative % rule was used in the supporting text). Policy E17 now contains a quantitative % rule as the primary consideration and the qualitative criteria are removed. The 2010 retail study recommended keeping the status quo in SH1.

4.4 Whilst we understand that there are no objections to the %-based approach in E17, we consider that a reasoned justification is required to support this intended approach.

4.5 We also note that Policy E17 allows for the potential of non-Class A uses within the primary retail frontages and therefore we recommend that non-A uses should be part of the 30% allowance and also the following criteria for assessing the impact on the vitality and viability of the town centre:

- The location and prominence of the premises within the shopping frontage;
- The floorspace and length of frontage of the premises;
- The number, distribution and proximity to other non-Class A1 premises, or with planning permissions for such use, within the frontage in question and throughout the town centre;
- The particular nature and character of the use proposed, including the level of pedestrian activity associated with it;
- The level of vacancies in ground floor properties; and
- Whether the proposed use would give rise to noise, smell or other environmental problems.

4.6 With regards to Policy E18, which deals with secondary retail frontages, we recommend a slightly revised wording as follows:

Within Secondary Shopping Frontages, the change of use from retail (A1) at ground floor level to other uses within use classes A2 to A5, amusement centres/arcades, laundrettes, community use, healthcare, leisure and recreational uses will be acceptable in principle, subject to:

(1) the overall shopping character is not undermined;

(2) the proposed use contributes positively to the town centre as the focus of commercial or community life of the town; and

(3) there is no detrimental effect on the visual or other special character and amenities of the surrounding area.

4.7 We consider that this wording provides greater clarity when assessing proposals within the secondary frontages.

4.8 We support the floorspace thresholds set out in draft Policy E19, although recommend that the penultimate paragraph is replaced with the following text:

“Exceptionally, a retail impact assessment may be required for smaller units where it is considered that the development either alone or with other developments would harm nearby centres”

4.9 After which, the following text should be inserted:

The Council will expect Impact Assessments to contain information on the following issues:

o the impact on existing, committed and planned public and private investment;

o the impact on town centre vitality and viability, with particular reference to choice and competition and town centre trade/turnover.

4.10 In any supporting text to Policy E19, we would also recommend that reference is made to the need to agree the scope of Retail Impact Assessments prior to the submission of planning applications.

Shopping frontage and town centre boundaries

- 4.11 With regards to shopping frontages within the main settlements, we have re-visited the recommendations of the 2010 study and suggest the following:
- Stroud. No changes needed to the primary shopping frontages, although additional secondary frontages should be defined along: Gloucester Street, the Shambles, John Street, Union Street, George Street and the area which accommodates the regular farmers market. We also recommend that the Local Plan defines a primary shopping area boundary and this should encompass all of the defined primary and secondary retail frontages in this instance.
 - Stonehouse. No change needed to the primary frontages although the town centre boundary should be extended north to include Elms Road.
 - Nailsworth. Extend town centre boundary to include western side of Bridge Street and eastern side of Bath Road (south of its junction with Fountain Street). No changes needed to the primary retail frontages.
 - No changes are required to the boundaries in Wotton-under-Edge, Cam, Dursley, Painswick and Minchinhampton.
 - We also recommend that Cainscross in Stroud is defined as a centre and that it extends to include the Co-op store, whilst Kings Stanley and Whitminster should also have defined centres.

The implications of the recent changes to Permitted Development rights for retail development

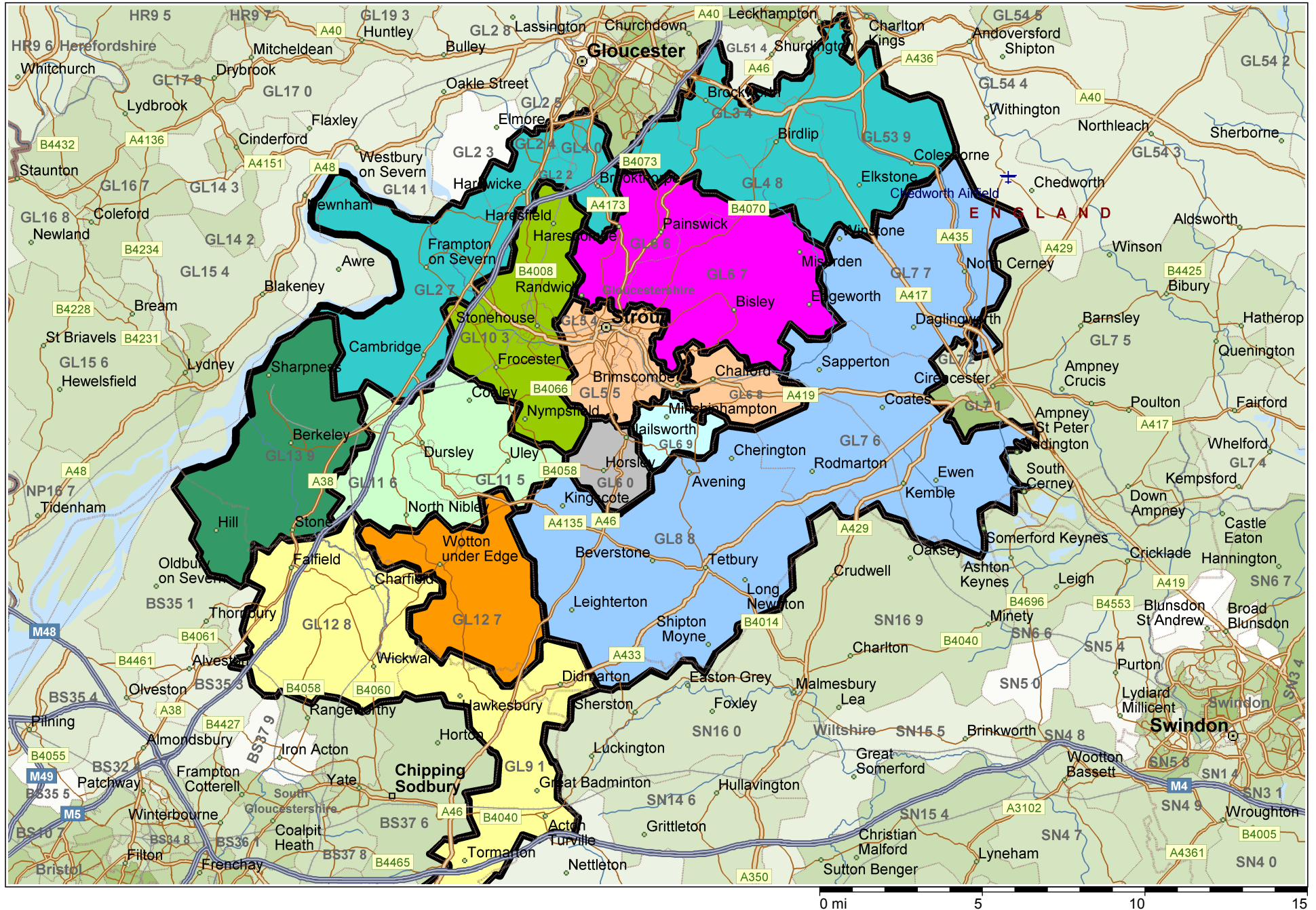
- 4.12 In April 2013, changes to the Permitted Development regime were introduced. Amongst the changes was the ability for premises falling within use classes A1/2/3/4/5, B1, D1/2 to change to A1, A2, A3 and B1 for a limited period of up to two years.
- 4.13 Such changes will, in principle, have an impact upon how policies E17 and E18 within the draft Local Plan will operate. For example, with the inability to control changes of use within the primary and secondary shopping frontages, the Council will need to carefully

consider applications for permanent changes of use which will fall to be considered under E17 and E18.

- 4.14 For example, a simple review of the proportion/length of frontage of non-Class A1 uses at the time when an application for permanent change of use is made may give rise to misleading results, particularly where owners and occupiers of premises are taking advantage of the new PD rights.
- 4.15 Therefore, SDC officers will need to look beyond the situation 'on the ground' and examine the provisions of policies E17 and E18 in the context of the lawful uses of primary and secondary frontage premises. This will require, for example, the keeping of a database which records the lawful use of premises in the primary and secondary areas and records each instance of an owner or occupier making use of the new PD rights. This will be possible as anyone wishing to take advantage of the PD rights must notify the local planning authority of their intention to do so.
- 4.16 In this way, we see no need to alter policies E17 and E18 in the draft Local Plan, as their operation can be successful, subject of course to the preparation of the recommended database. This will also apply to the existing saved policies in the current Local Plan, such as Policy SH1.

Appendix A
Study area

Appendix A - stroud household survey area map



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Appendix B
Quantitative need assessment (9,500 dwellings – Option B)

TABLE 1: POPULATION WITHIN STUDY AREA, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
2011	31373	13953	7761	6627	3373	6366	15798	6328	11384	5863	53552	18139
2013	31569	14042	7777	6631	3394	6388	15798	6353	11384	5924	53954	18336
2016	31932	14207	7807	6640	3434	6430	15963	6401	11554	6038	54699	18703
2021	32618	14520	7865	6656	3510	6508	16235	6490	11812	6252	56108	19395
2026	32641	14530	7867	6656	3512	6511	16561	6493	12088	6260	56155	19418
2031	33122	14749	7907	6667	3565	6566	16883	6556	12365	6410	57141	19903

Notes:

2011 population from 2011 Census results.

TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
2013	2013	1961	2252	2125	1977	2015	2243	2091	2119	2078	1947	1998
2016	2019	1967	2258	2132	1983	2021	2249	2097	2125	2085	1953	2004
2021	2080	2027	2327	2196	2043	2082	2318	2161	2189	2148	2012	2065
2026	2163	2107	2419	2283	2124	2165	2410	2247	2276	2233	2092	2147
2031	2239	2182	2505	2364	2199	2242	2495	2326	2357	2312	2166	2223

Notes:

Expenditure data provided by Experian.

Projections between 2011 and 2031 based on forecasts provided by Appendix 3 of Experian Retail Planner Briefing Note 10.1 (October 2012) which take into account changes in expenditure on special forms of trading.

TABLE 3a: PER CAPITA EXPENDITURE ON CLOTHES AND SHOES, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
	722	709	830	871	661	728	842	789	847	727	767	737
2013	666	654	766	804	610	672	777	728	782	671	708	680
2016	707	694	813	853	647	713	825	773	830	712	751	722
2021	788	774	906	951	722	795	919	862	925	794	838	805
2026	907	891	1043	1094	830	914	1058	991	1064	913	963	926
2031	1046	1027	1203	1262	958	1055	1220	1143	1227	1053	1111	1068

Notes:

Expenditure data provided by Experian.

Projections between 2011 and 2031 based on forecasts provided by Appendix 3 of Experian Retail Planner Briefing Note 10.1 (October 2012) which take into account changes in expenditure on special forms of trading.

TABLE 3b: PER CAPITA EXPENDITURE ON SMALL HOUSEHOLD ITEMS, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
	1484	1443	1824	1824	1433	1564	1771	1610	1820	1626	1525	1511
2013	1369	1332	1683	1683	1322	1443	1635	1486	1679	1501	1407	1394
2016	1453	1413	1786	1786	1403	1532	1735	1577	1782	1592	1493	1480
2021	1620	1576	1991	1991	1565	1708	1934	1758	1987	1775	1665	1650
2026	1863	1813	2290	2291	1800	1965	2225	2022	2285	2042	1915	1898
2031	2150	2091	2642	2643	2076	2266	2566	2333	2637	2356	2209	2189

Notes:

Expenditure data provided by Experian.

Projections between 2011 and 2031 based on forecasts provided by Appendix 3 of Experian Retail Planner Briefing Note 10.1 (October 2012) which take into account changes in expenditure on special forms of trading.

TABLE 3c: PER CAPITA EXPENDITURE ON FURNITURE, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
	217	214	281	271	225	233	266	251	275	235	219	220
2013	200	198	259	250	208	215	246	232	253	217	202	203
2016	212	210	275	265	220	228	261	246	269	230	214	215
2021	237	234	307	296	246	255	291	274	300	256	239	240
2026	272	269	353	340	283	293	335	315	345	295	275	276
2031	314	310	407	393	326	338	386	364	398	340	317	318

Notes:

Expenditure data provided by Experian.

Projections between 2011 and 2031 based on forecasts provided by Appendix 3 of Experian Retail Planner Briefing Note 10.1 (October 2012) which take into account changes in expenditure on special forms of trading.

TABLE 3d: PER CAPITA EXPENDITURE ON ELECTRICAL GOODS, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
	443	438	447	482	413	436	489	478	465	473	449	439
2013	408	404	413	445	381	402	451	441	429	437	415	405
2016	433	429	438	472	405	427	479	468	455	463	440	430
2021	483	478	489	527	451	476	534	522	507	517	491	480
2026	556	550	562	606	519	548	614	600	583	594	564	552
2031	641	634	648	699	599	632	708	692	673	686	651	636

Notes:

Expenditure data provided by Experian.

Projections between 2011 and 2031 based on forecasts provided by Appendix 3 of Experian Retail Planner Briefing Note 10.1 (October 2012) which take into account changes in expenditure on special forms of trading.

TABLE 3e: PER CAPITA EXPENDITURE ON DIY GOODS, BY ZONE

	ZONE											
	1	2	3	4A	4B	5	6	7	8	9	10	11
	285	283	422	363	312	319	364	334	362	332	281	291
2013	263	261	390	335	288	294	336	308	334	306	260	269
2016	279	277	413	356	306	312	356	327	354	325	275	285
2021	311	309	461	396	341	348	397	365	395	363	307	318
2026	358	355	530	456	392	401	457	419	454	417	353	366
2031	413	410	612	526	452	462	527	484	524	481	408	422

Notes:

Expenditure data provided by Experian.

Projections between 2011 and 2031 based on forecasts provided by Appendix 3 of Experian Retail Planner Briefing Note 10.1 (October 2012) which take into account changes in expenditure on special forms of trading.

TABLE 4: TOTAL CONVENIENCE GOODS EXPENDITURE, BY ZONE

	ZONE											Total	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£63.5	£27.5	£17.5	£14.1	£6.7	£12.9	£35.4	£13.3	£24.1	£12.3	£105.1	£36.6	£369.1
2016	£64.5	£27.9	£17.6	£14.2	£6.8	£13.0	£35.9	£13.4	£24.6	£12.6	£106.8	£37.5	£374.8
2021	£67.9	£29.4	£18.3	£14.6	£7.2	£13.6	£37.6	£14.0	£25.9	£13.4	£112.9	£40.1	£394.8
2026	£70.6	£30.6	£19.0	£15.2	£7.5	£14.1	£39.9	£14.6	£27.5	£14.0	£117.5	£41.7	£412.1
2031	£74.2	£32.2	£19.8	£15.8	£7.8	£14.7	£42.1	£15.3	£29.1	£14.8	£123.8	£44.2	£433.9

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 5a: TOTAL EXPENDITURE ON CLOTHES AND SHOES, BY ZONE

	ZONE											TOTAL	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£21.0	£9.2	£6.0	£5.3	£2.1	£4.3	£12.3	£4.6	£8.9	£4.0	£38.2	£12.5	£128.3
2016	£22.6	£9.9	£6.3	£5.7	£2.2	£4.6	£13.2	£4.9	£9.6	£4.3	£41.1	£13.5	£137.8
2021	£25.7	£11.2	£7.1	£6.3	£2.5	£5.2	£14.9	£5.6	£10.9	£5.0	£47.0	£15.6	£157.1
2026	£29.6	£12.9	£8.2	£7.3	£2.9	£6.0	£17.5	£6.4	£12.9	£5.7	£54.1	£18.0	£181.5
2031	£34.7	£15.2	£9.5	£8.4	£3.4	£6.9	£20.6	£7.5	£15.2	£6.8	£63.5	£21.3	£212.9

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 5b: TOTAL EXPENDITURE ON SMALL HOUSEHOLD ITEMS, BY ZONE

	ZONE											TOTAL	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£43.2	£18.7	£13.1	£11.2	£4.5	£9.2	£25.8	£9.4	£19.1	£8.9	£75.9	£25.6	£264.6
2016	£46.4	£20.1	£13.9	£11.9	£4.8	£9.8	£27.7	£10.1	£20.6	£9.6	£81.7	£27.7	£284.3
2021	£52.8	£22.9	£15.7	£13.3	£5.5	£11.1	£31.4	£11.4	£23.5	£11.1	£93.4	£32.0	£324.0
2026	£60.8	£26.3	£18.0	£15.2	£6.3	£12.8	£36.8	£13.1	£27.6	£12.8	£107.5	£36.8	£374.3
2031	£71.2	£30.8	£20.9	£17.6	£7.4	£14.9	£43.3	£15.3	£32.6	£15.1	£126.2	£43.6	£439.0

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 5c: TOTAL EXPENDITURE ON FURNITURE, BY ZONE

	ZONE											TOTAL	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£6.3	£2.8	£2.0	£1.7	£0.7	£1.4	£3.9	£1.5	£2.9	£1.3	£10.9	£3.7	£39.0
2016	£6.8	£3.0	£2.1	£1.8	£0.8	£1.5	£4.2	£1.6	£3.1	£1.4	£11.7	£4.0	£41.9
2021	£7.7	£3.4	£2.4	£2.0	£0.9	£1.7	£4.7	£1.8	£3.5	£1.6	£13.4	£4.7	£47.7
2026	£8.9	£3.9	£2.8	£2.3	£1.0	£1.9	£5.5	£2.0	£4.2	£1.8	£15.4	£5.4	£55.1
2031	£10.4	£4.6	£3.2	£2.6	£1.2	£2.2	£6.5	£2.4	£4.9	£2.2	£18.1	£6.3	£64.6

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 5d: TOTAL EXPENDITURE ON ELECTRICAL GOODS, BY ZONE

	ZONE											TOTAL	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£12.9	£5.7	£3.2	£3.0	£1.3	£2.6	£7.1	£2.8	£4.9	£2.6	£22.4	£7.4	£75.8
2016	£13.8	£6.1	£3.4	£3.1	£1.4	£2.7	£7.6	£3.0	£5.3	£2.8	£24.1	£8.0	£81.4
2021	£15.8	£6.9	£3.8	£3.5	£1.6	£3.1	£8.7	£3.4	£6.0	£3.2	£27.5	£9.3	£92.8
2026	£18.1	£8.0	£4.4	£4.0	£1.8	£3.6	£10.2	£3.9	£7.1	£3.7	£31.7	£10.7	£107.2
2031	£21.2	£9.4	£5.1	£4.7	£2.1	£4.1	£12.0	£4.5	£8.3	£4.4	£37.2	£12.7	£125.7

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 5e: TOTAL EXPENDITURE ON DIY GOODS, BY ZONE

	ZONE											TOTAL	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£8.3	£3.7	£3.0	£2.2	£1.0	£1.9	£5.3	£2.0	£3.8	£1.8	£14.0	£4.9	£51.9
2016	£8.9	£3.9	£3.2	£2.4	£1.0	£2.0	£5.7	£2.1	£4.1	£2.0	£15.1	£5.3	£55.7
2021	£10.2	£4.5	£3.6	£2.6	£1.2	£2.3	£6.4	£2.4	£4.7	£2.3	£17.2	£6.2	£63.5
2026	£11.7	£5.2	£4.2	£3.0	£1.4	£2.6	£7.6	£2.7	£5.5	£2.6	£19.8	£7.1	£73.4
2031	£13.7	£6.0	£4.8	£3.5	£1.6	£3.0	£8.9	£3.2	£6.5	£3.1	£23.3	£8.4	£86.0

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 5f: TOTAL COMPARISON GOODS EXPENDITURE, BY ZONE

	ZONE											TOTAL	
	1	2	3	4A	4B	5	6	7	8	9	10		11
2013	£91.8	£40.0	£27.3	£23.3	£9.5	£19.3	£54.4	£20.3	£39.6	£18.5	£161.4	£54.1	£559.6
2016	£98.5	£43.0	£29.1	£24.8	£10.2	£20.7	£58.3	£21.7	£42.6	£20.1	£173.6	£58.6	£601.2
2021	£112.2	£48.9	£32.7	£27.7	£11.7	£23.3	£66.2	£24.5	£48.6	£23.2	£198.6	£67.7	£685.2
2026	£129.1	£56.3	£37.6	£31.9	£13.4	£26.8	£77.6	£28.2	£57.2	£26.7	£228.6	£78.0	£791.5
2031	£151.2	£66.0	£43.6	£36.8	£15.7	£31.2	£91.3	£32.9	£67.5	£31.5	£268.4	£92.2	£928.3

Notes:

Total expenditure calculated by multiplying population with per capita retail expenditure, by zone.

TABLE 9d: COMPARISON GOODS TURNOVER, 2026

	INDONESIA												UNITED STATES												EUROPEAN UNION												CHINA												TOTAL												
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12													
INDONESIA	219	227	215	208	205	204	202	200	202	202	200	201	219	219	208	201	213	213	214	204	204	207	207	211	217	201	208	204	203	203	205	205	200	200	202	202	209	210	210	211	208	208	202	201	200	202	200	202	217	212	212	210	207	211	211	211	201	201	202	204	2194
UNITED STATES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00												
EUROPEAN UNION	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00											
CHINA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00										
TOTAL	219	227	215	208	205	204	202	200	202	202	200	201	219	219	208	201	213	213	214	204	204	207	207	211	217	201	208	204	203	203	205	205	200	200	202	202	209	210	210	211	208	208	202	201	200	202	200	202	217	212	212	210	207	211	211	211	201	201	202	204	2194

Note:

TABLE 9e: COMPARISON GOODS TURNOVER, 2021

	INDONESIA (INDONESIA)												INDONESIA (INDONESIA)												INDONESIA (INDONESIA)												INDONESIA (INDONESIA)												INDONESIA (INDONESIA)											
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
INDONESIA	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101
CELEBES	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101
SUMBAWA	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101
INDONESIA (INDONESIA)	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101
INDONESIA (INDONESIA)	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101	192	151	113	115	106	110	103	100	102	101	100	101

Note:

TABLE 10: CONVENIENCE FLOORSPACE IN THE MAIN SETTLEMENTS IN STROUD DISTRICT

STORE / LOCATION	FLOORSPACE (sq m net)		CONV GOODS SALES DENSITY (£/sq m)	TOTAL CONVENIENCE GOODS TURNOVER (£m)
	Total Net Sales	Convenience Goods Sales		
STROUD				
Tesco, Stroud	3,367	2,357	11,126	26.2
Sainsbury's Stroud	3,812	2,859	12,537	35.8
Waitrose, Stroud	2,401	2,041	11,818	24.1
Iceland, Stroud	483	459	7,265	3.3
Co-op, Cashes Green, Stroud	1,068	962	7,496	7.2
Co-op, Slad Road, Stroud	148	133	7,496	1.0
Other		1,480	5,000	7.4
TOTAL				105.1
CAM				
Tesco, Cam	1,538	1,307	11,126	14.5
DURSLEY				
Iceland, Parsonage Street, Dursley	500	450	7,265	3.3
Co-op, Rosebery Road, Dursley	141	134	7,496	1.0
Lidl, Kingshill Road, Dursley	643	546	3,949	2.2
Sainsburys, Dursley		1,486	12,537	18.6
Other	481	433	4,500	1.9
TOTAL				27.0
WOTTON				
Co-op	429	386	7,496	2.9
Tesco Express	150	143	11,126	1.6
Other	438	438	4,500	2.0
TOTAL				6.5
NAILSWORTH				
Morrisons, Nailsworth	1159	1,043	12,431	13.0
Tesco Express, Nailsworth	151	143	11,126	1.6
Co-op	232	209	7,496	1.6
Other		550	4,500	2.5
TOTAL				18.6
STONEHOUSE				
Co-op, High Street, Stonehouse	1076	968	7,496	7.3
Co-op, Eastington	141	134	7,496	1.0
Co-op, Elm Road, Stonehouse	100	95	7,496	0.7
Co-op, Kings Stanley	136	129	7,496	1.0
Other	254	241	4,500	1.1
BERKELEY	401	381	4,500	1.7
MINCHINHAMPTON	150	143	4,500	0.6

TABLE 11: COMMITMENTS IN STROUD DISTRICT

	FLOORSPACE (sq m net)	SALES DENSITY (£/sq m)	BENCHMARK TURNOVER (£m)
<i>Tesco extension, Cam</i>			
convenience	432	11126	4.8
comparison	295	10079	3.0

Notes:

floorspace data from Stroud District Council, GVA and IGD data

sales densities for large stores derived from Mintel and Verdict research and sales densities for other town centre floorspace based on GVA assumptions.

TABLE 12a: CONVENIENCE GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.9
Turnover from study area	£101.1	£102.4	£107.4	£111.8	£117.3
Market share	27.4%	27.3%	27.2%	27.1%	27.0%
Expenditure inflow	£7.1	£7.2	£7.5	£7.8	£8.2
Total turnover potential	£108.2	£109.6	£115.0	£119.6	£125.5
Benchmark turnover of existing and committed facilities	£105.1	£105.44	£106.18	£107.25	£108.32
Residual expenditure	£3.1	£4.1	£8.8	£12.4	£17.1
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	256	344	725	1013	1386

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12b: CONVENIENCE GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.9
Turnover from study area	£40.4	£41.3	£44.0	£45.8	£48.6
Market share	11.0%	11.0%	11.1%	11.1%	11.2%
Expenditure inflow	£2.6	£2.7	£2.9	£3.0	£3.2
Total turnover potential	£43.1	£44.0	£46.9	£48.8	£51.7
Benchmark turnover of existing and committed facilities	£46.4	£46.5	£46.8	£47.3	£47.8
Residual expenditure	-£3.3	-£2.5	£0.0	£1.5	£4.0
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-276	-209	2	124	320

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12c: CONVENIENCE GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.9
Turnover from study area	£20.6	£20.8	£21.8	£22.7	£23.8
Market share	5.6%	5.6%	5.5%	5.5%	5.5%
Expenditure inflow	£1.3	£1.4	£1.4	£1.5	£1.5
Total turnover potential	£21.9	£22.2	£23.2	£24.2	£25.4
Benchmark turnover of existing and committed facilities	£18.6	£18.6	£18.8	£19.0	£19.2
Residual expenditure	£3.3	£3.5	£4.4	£5.2	£6.2
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	275	292	366	429	504

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12d: CONVENIENCE GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.9
Turnover from study area	£9.2	£9.3	£9.7	£10.2	£10.7
Market share	2.5%	2.5%	2.5%	2.5%	2.5%
Expenditure inflow	£0.8	£0.8	£0.9	£0.9	£1.0
Total turnover potential	£10.0	£10.1	£10.6	£11.1	£11.7
Benchmark turnover of existing and committed facilities	£6.5	£6.5	£6.5	£6.6	£6.6
Residual expenditure	£3.5	£3.7	£4.1	£4.5	£5.0
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	295	304	338	371	408

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12e: CONVENIENCE GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.9
Turnover from study area	£9.2	£9.3	£9.8	£10.2	£10.7
Market share	2.5%	2.5%	2.5%	2.5%	2.5%
Expenditure inflow	£0.8	£0.8	£0.9	£0.9	£1.0
Total turnover potential	£10.0	£10.1	£10.7	£11.1	£11.7
Benchmark turnover of existing and committed facilities	£11.0	£11.1	£11.1	£11.2	£11.4
Residual expenditure	-£1.0	-£0.9	-£0.4	-£0.1	£0.3
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-85	-75	-37	-10	26

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13a: COMPARISON GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.2	£685.2	£791.5	£928.3
Turnover from study area	£96.8	£103.8	£117.9	£135.8	£158.7
Market share	17.3%	17.3%	17.2%	17.2%	17.1%
Expenditure inflow	£5.8	£6.2	£7.1	£8.1	£9.5
Total turnover potential	£102.6	£110.0	£124.9	£143.9	£168.2
Benchmark turnover of existing and committed facilities	£102.6	£108.3	£119.4	£130.7	£142.9
Residual expenditure	£0.0	£1.7	£5.5	£13.2	£25.3
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	327	943	2075	3634

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13b: COMPARISON GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.2	£685.2	£791.5	£928.3
Turnover from study area	£12.9	£15.63	£17.82	£20.58	£24.13
Market share	2.3%	2.6%	2.6%	2.6%	2.6%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£13.4	£16.3	£18.5	£21.4	£25.1
Benchmark turnover of existing and committed facilities	£16.4	£17.3	£19.1	£20.9	£22.9
Residual expenditure	-£3.0	-£1.1	-£0.6	£0.5	£2.2
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	-595	-202	-99	78	322

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13c: COMPARISON GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.2	£685.2	£791.5	£928.3
Turnover from study area	£13.3	£14.2	£16.1	£18.6	£21.7
Market share	2.4%	2.4%	2.4%	2.3%	2.3%
Expenditure inflow	£0.5	£0.6	£0.6	£0.7	£0.9
Total turnover potential	£13.8	£14.8	£16.8	£19.3	£22.6
Benchmark turnover of existing and committed facilities	£13.8	£14.6	£16.1	£17.6	£19.2
Residual expenditure	£0.0	£0.2	£0.7	£1.7	£3.4
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	41	119	275	482

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13d: COMPARISON GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.2	£685.2	£791.5	£928.3
Turnover from study area	£3.5	£3.7	£4.2	£4.9	£5.7
Market share	0.6%	0.6%	0.6%	0.6%	0.6%
Expenditure inflow	£0.3	£0.3	£0.3	£0.4	£0.5
Total turnover potential	£3.7	£4.0	£4.5	£5.3	£6.2
Benchmark turnover of existing and committed facilities	£3.7	£3.9	£4.3	£4.8	£5.2
Residual expenditure	£0.0	£0.1	£0.2	£0.5	£1.0
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	12	34	80	138

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13e: COMPARISON GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.2	£685.2	£791.5	£928.3
Turnover from study area	£6.8	£7.3	£8.3	£9.6	£11.2
Market share	1.2%	1.2%	1.2%	1.2%	1.2%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£0.9
Total turnover potential	£7.3	£7.9	£9.0	£10.3	£12.1
Benchmark turnover of existing and committed facilities	£7.3	£7.8	£8.6	£9.4	£10.2
Residual expenditure	£0.0	£0.1	£0.4	£1.0	£1.9
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	25	72	153	267

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

Appendix C
Quantitative need assessment (9,500 dwellings – Option A)

TABLE 12a: CONVENIENCE GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£395.1	£412.1	£433.8
Turnover from study area	£101.2	£102.7	£108.5	£112.6	£118.4
Market share	27.4%	27.4%	27.5%	27.3%	27.3%
Expenditure inflow	£7.1	£7.2	£7.6	£7.9	£8.3
Total turnover potential	£108.3	£109.9	£116.1	£120.5	£126.7
Benchmark turnover of existing and committed facilities	£105.1	£105.44	£106.18	£107.25	£108.32
Residual expenditure	£3.2	£4.5	£9.9	£13.3	£18.4
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	266	373	818	1083	1485

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12b: CONVENIENCE GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£395.1	£412.1	£433.8
Turnover from study area	£40.3	£40.9	£43.2	£45.0	£47.3
Market share	10.9%	10.9%	10.9%	10.9%	10.9%
Expenditure inflow	£2.6	£2.7	£2.8	£2.9	£3.1
Total turnover potential	£42.9	£43.6	£46.0	£47.9	£50.4
Benchmark turnover of existing and committed facilities	£46.4	£46.5	£46.8	£47.3	£47.8
Residual expenditure	-£3.4	-£2.9	-£0.9	£0.6	£2.6
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-287	-242	-70	48	212

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12c: CONVENIENCE GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£395.1	£412.1	£433.8
Turnover from study area	£20.6	£20.8	£21.8	£22.7	£23.9
Market share	5.6%	5.6%	5.5%	5.5%	5.5%
Expenditure inflow	£1.3	£1.4	£1.4	£1.5	£1.6
Total turnover potential	£21.9	£22.2	£23.3	£24.2	£25.4
Benchmark turnover of existing and committed facilities	£18.6	£18.6	£18.8	£19.0	£19.2
Residual expenditure	£3.3	£3.5	£4.5	£5.3	£6.2
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	275	292	369	429	505

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12d: CONVENIENCE GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£395.1	£412.1	£433.8
Turnover from study area	£9.2	£9.3	£9.7	£10.2	£10.7
Market share	2.5%	2.5%	2.5%	2.5%	2.5%
Expenditure inflow	£0.8	£0.8	£0.9	£0.9	£1.0
Total turnover potential	£10.0	£10.1	£10.6	£11.1	£11.7
Benchmark turnover of existing and committed facilities	£6.5	£6.5	£6.5	£6.6	£6.6
Residual expenditure	£3.5	£3.7	£4.1	£4.5	£5.0
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	295	304	338	370	406

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12e: CONVENIENCE GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£395.1	£412.1	£433.8
Turnover from study area	£9.3	£9.7	£10.7	£11.1	£12.0
Market share	2.5%	2.6%	2.7%	2.7%	2.8%
Expenditure inflow	£0.8	£0.9	£1.0	£1.0	£1.1
Total turnover potential	£10.1	£10.6	£11.6	£12.1	£13.1
Benchmark turnover of existing and committed facilities	£11.0	£11.1	£11.1	£11.2	£11.4
Residual expenditure	-£0.9	-£0.5	£0.5	£0.9	£1.8
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-73	-41	41	71	142

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13a: COMPARISON GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.0	£685.6	£791.3	£927.9
Turnover from study area	£97.0	£104.1	£119.0	£136.8	£160.3
Market share	17.3%	17.3%	17.4%	17.3%	17.3%
Expenditure inflow	£5.8	£6.2	£7.1	£8.2	£9.6
Total turnover potential	£102.8	£110.4	£126.1	£145.0	£169.9
Benchmark turnover of existing and committed facilities	£102.8	£108.4	£119.6	£130.9	£143.1
Residual expenditure	£0.0	£2.0	£6.5	£14.1	£26.8
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	371	1125	2215	3850

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13b: COMPARISON GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.0	£685.6	£791.3	£927.9
Turnover from study area	£12.9	£15.63	£17.82	£20.57	£24.12
Market share	2.3%	2.6%	2.6%	2.6%	2.6%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£13.4	£16.3	£18.5	£21.4	£25.1
Benchmark turnover of existing and committed facilities	£16.4	£17.3	£19.1	£20.9	£22.8
Residual expenditure	-£3.0	-£1.0	-£0.5	£0.5	£2.3
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	-595	-194	-89	85	329

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13c: COMPARISON GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.0	£685.6	£791.3	£927.9
Turnover from study area	£13.3	£14.2	£16.1	£18.6	£21.6
Market share	2.4%	2.4%	2.3%	2.3%	2.3%
Expenditure inflow	£0.5	£0.6	£0.6	£0.7	£0.9
Total turnover potential	£13.8	£14.8	£16.7	£19.3	£22.5
Benchmark turnover of existing and committed facilities	£13.8	£14.6	£16.1	£17.6	£19.2
Residual expenditure	£0.0	£0.2	£0.7	£1.7	£3.3
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	39	115	268	472

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13d: COMPARISON GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.0	£685.6	£791.3	£927.9
Turnover from study area	£3.5	£3.7	£4.2	£4.9	£5.7
Market share	0.6%	0.6%	0.6%	0.6%	0.6%
Expenditure inflow	£0.3	£0.3	£0.3	£0.4	£0.5
Total turnover potential	£3.7	£4.0	£4.5	£5.2	£6.1
Benchmark turnover of existing and committed facilities	£3.7	£3.9	£4.3	£4.8	£5.2
Residual expenditure	£0.0	£0.1	£0.2	£0.5	£0.9
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	12	32	77	134

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13e: COMPARISON GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.0	£685.6	£791.3	£927.9
Turnover from study area	£6.9	£7.5	£8.8	£10.2	£12.2
Market share	1.2%	1.2%	1.3%	1.3%	1.3%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£7.4	£8.1	£9.5	£11.0	£13.1
Benchmark turnover of existing and committed facilities	£7.4	£7.8	£8.6	£9.5	£10.3
Residual expenditure	£0.0	£0.3	£0.9	£1.5	£2.8
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	53	156	242	404

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

Appendix D
Quantitative need assessment (9,500 dwellings – Option C)

TABLE 12a: CONVENIENCE GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.8
Turnover from study area	£101.1	£102.4	£107.5	£111.9	£117.4
Market share	27.4%	27.3%	27.2%	27.2%	27.1%
Expenditure inflow	£7.1	£7.2	£7.5	£7.8	£8.2
Total turnover potential	£108.2	£109.6	£115.0	£119.7	£125.6
Benchmark turnover of existing and committed facilities	£105.1	£105.44	£106.18	£107.25	£108.32
Residual expenditure	£3.1	£4.2	£8.9	£12.5	£17.3
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	257	347	731	1020	1396

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12b: CONVENIENCE GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.8
Turnover from study area	£40.4	£41.2	£43.8	£45.6	£48.2
Market share	10.9%	11.0%	11.1%	11.1%	11.1%
Expenditure inflow	£2.6	£2.7	£2.8	£3.0	£3.1
Total turnover potential	£43.0	£43.9	£46.6	£48.6	£51.4
Benchmark turnover of existing and committed facilities	£46.4	£46.5	£46.8	£47.3	£47.8
Residual expenditure	-£3.3	-£2.6	-£0.2	£1.3	£3.6
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-278	-218	-16	104	292

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12c: CONVENIENCE GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.8
Turnover from study area	£20.5	£20.8	£21.7	£22.7	£23.7
Market share	5.6%	5.5%	5.5%	5.5%	5.5%
Expenditure inflow	£1.3	£1.4	£1.4	£1.5	£1.5
Total turnover potential	£21.9	£22.1	£23.1	£24.1	£25.3
Benchmark turnover of existing and committed facilities	£18.6	£18.6	£18.8	£19.0	£19.2
Residual expenditure	£3.3	£3.5	£4.3	£5.2	£6.1
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	274	289	359	422	494

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12d: CONVENIENCE GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.8
Turnover from study area	£9.2	£9.3	£9.7	£10.2	£10.7
Market share	2.5%	2.5%	2.5%	2.5%	2.5%
Expenditure inflow	£0.8	£0.8	£0.9	£0.9	£1.0
Total turnover potential	£10.0	£10.1	£10.6	£11.1	£11.6
Benchmark turnover of existing and committed facilities	£6.5	£6.5	£6.5	£6.6	£6.6
Residual expenditure	£3.5	£3.6	£4.1	£4.5	£5.0
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	295	302	334	367	402

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12e: CONVENIENCE GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.1	£374.8	£394.8	£412.1	£433.8
Turnover from study area	£9.2	£9.5	£10.1	£10.6	£11.2
Market share	2.5%	2.5%	2.6%	2.6%	2.6%
Expenditure inflow	£0.8	£0.9	£0.9	£1.0	£1.0
Total turnover potential	£10.1	£10.3	£11.1	£11.5	£12.3
Benchmark turnover of existing and committed facilities	£11.0	£11.1	£11.1	£11.2	£11.4
Residual expenditure	-£1.0	-£0.7	-£0.1	£0.3	£0.9
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-80	-62	-6	22	72

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13a: COMPARISON GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.1	£685.1	£791.4	£928.1
Turnover from study area	£96.9	£103.8	£118.0	£135.9	£158.9
Market share	17.3%	17.3%	17.2%	17.2%	17.1%
Expenditure inflow	£5.8	£6.2	£7.1	£8.2	£9.5
Total turnover potential	£102.7	£110.1	£125.0	£144.1	£168.4
Benchmark turnover of existing and committed facilities	£102.7	£108.3	£119.5	£130.7	£142.9
Residual expenditure	£0.0	£1.8	£5.6	£13.3	£25.5
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	333	959	2093	3662

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13b: COMPARISON GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.1	£685.1	£791.4	£928.1
Turnover from study area	£12.9	£15.63	£17.81	£20.58	£24.13
Market share	2.3%	2.6%	2.6%	2.6%	2.6%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£13.4	£16.3	£18.5	£21.4	£25.1
Benchmark turnover of existing and committed facilities	£16.4	£17.3	£19.1	£20.9	£22.8
Residual expenditure	-£3.0	-£1.1	-£0.6	£0.5	£2.3
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	-595	-200	-97	80	324

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13c: COMPARISON GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.1	£685.1	£791.4	£928.1
Turnover from study area	£13.3	£14.2	£16.1	£18.5	£21.6
Market share	2.4%	2.4%	2.3%	2.3%	2.3%
Expenditure inflow	£0.5	£0.6	£0.6	£0.7	£0.9
Total turnover potential	£13.8	£14.8	£16.7	£19.3	£22.5
Benchmark turnover of existing and committed facilities	£13.8	£14.6	£16.1	£17.6	£19.2
Residual expenditure	£0.0	£0.2	£0.6	£1.7	£3.2
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	38	108	263	464

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13d: COMPARISON GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.1	£685.1	£791.4	£928.1
Turnover from study area	£3.5	£3.7	£4.2	£4.9	£5.7
Market share	0.6%	0.6%	0.6%	0.6%	0.6%
Expenditure inflow	£0.3	£0.3	£0.3	£0.4	£0.5
Total turnover potential	£3.7	£4.0	£4.5	£5.2	£6.1
Benchmark turnover of existing and committed facilities	£3.7	£3.9	£4.3	£4.8	£5.2
Residual expenditure	£0.0	£0.1	£0.2	£0.5	£0.9
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	11	31	76	132

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13e: COMPARISON GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.6	£601.1	£685.1	£791.4	£928.1
Turnover from study area	£6.8	£7.4	£8.5	£9.8	£11.6
Market share	1.2%	1.2%	1.2%	1.2%	1.2%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£0.9
Total turnover potential	£7.4	£8.0	£9.2	£10.6	£12.5
Benchmark turnover of existing and committed facilities	£7.4	£7.8	£8.6	£9.4	£10.3
Residual expenditure	£0.0	£0.2	£0.6	£1.2	£2.2
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	36	104	188	320

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

Appendix E
Quantitative need assessment (11,500 dwellings – Option A)

TABLE 12a: CONVENIENCE GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£367.0	£374.1	£393.9	£419.3	£443.5
Turnover from study area	£101.1	£102.4	£107.5	£114.1	£120.3
Market share	27.5%	27.4%	27.3%	27.2%	27.1%
Expenditure inflow	£7.1	£7.2	£7.5	£8.0	£8.4
Total turnover potential	£108.2	£109.5	£115.0	£122.1	£128.8
Benchmark turnover of existing and committed facilities	£105.1	£105.44	£106.18	£107.25	£108.32
Residual expenditure	£3.0	£4.1	£8.8	£14.8	£20.4
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	252	340	729	1211	1654

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12b: CONVENIENCE GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£367.0	£374.1	£393.9	£419.3	£443.5
Turnover from study area	£40.4	£41.1	£43.7	£46.9	£50.0
Market share	11.0%	11.0%	11.1%	11.2%	11.3%
Expenditure inflow	£2.6	£2.7	£2.8	£3.0	£3.3
Total turnover potential	£43.0	£43.8	£46.5	£50.0	£53.3
Benchmark turnover of existing and committed facilities	£46.4	£46.5	£46.8	£47.3	£47.8
Residual expenditure	-£3.4	-£2.7	-£0.3	£2.7	£5.5
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-280	-226	-26	217	444

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12c: CONVENIENCE GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£367.0	£374.1	£393.9	£419.3	£443.5
Turnover from study area	£20.5	£20.8	£21.7	£22.9	£24.1
Market share	5.6%	5.5%	5.5%	5.5%	5.4%
Expenditure inflow	£1.3	£1.3	£1.4	£1.5	£1.6
Total turnover potential	£21.9	£22.1	£23.1	£24.4	£25.6
Benchmark turnover of existing and committed facilities	£18.6	£18.6	£18.8	£19.0	£19.2
Residual expenditure	£3.3	£3.5	£4.3	£5.4	£6.5
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	273	287	357	444	524

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12d: CONVENIENCE GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£367.0	£374.1	£393.9	£419.3	£443.5
Turnover from study area	£9.2	£9.3	£9.7	£10.2	£10.8
Market share	2.5%	2.5%	2.5%	2.4%	2.4%
Expenditure inflow	£0.8	£0.8	£0.9	£0.9	£1.0
Total turnover potential	£10.0	£10.1	£10.6	£11.2	£11.7
Benchmark turnover of existing and committed facilities	£6.5	£6.5	£6.5	£6.6	£6.6
Residual expenditure	£3.5	£3.6	£4.1	£4.6	£5.1
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	295	302	334	375	412

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12e: CONVENIENCE GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£367.0	£374.1	£393.9	£419.3	£443.5
Turnover from study area	£9.3	£9.5	£10.3	£11.3	£12.3
Market share	2.5%	2.5%	2.6%	2.7%	2.8%
Expenditure inflow	£0.8	£0.9	£0.9	£1.0	£1.1
Total turnover potential	£10.1	£10.4	£11.3	£12.4	£13.4
Benchmark turnover of existing and committed facilities	£11.0	£11.1	£11.1	£11.2	£11.4
Residual expenditure	-£0.9	-£0.7	£0.1	£1.1	£2.0
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-78	-57	10	90	165

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13a: COMPARISON GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£556.4	£600.1	£683.6	£804.8	£948.4
Turnover from study area	£96.8	£103.8	£118.0	£138.6	£163.0
Market share	17.4%	17.3%	17.3%	17.2%	17.2%
Expenditure inflow	£5.8	£6.2	£7.1	£8.3	£9.8
Total turnover potential	£102.6	£110.0	£125.1	£146.9	£172.8
Benchmark turnover of existing and committed facilities	£102.6	£108.3	£119.4	£130.7	£142.9
Residual expenditure	£0.0	£1.7	£5.6	£16.3	£29.9
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	327	969	2553	4298

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13b: COMPARISON GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£556.4	£600.1	£683.6	£804.8	£948.4
Turnover from study area	£12.9	£15.60	£17.77	£20.93	£24.66
Market share	2.3%	2.6%	2.6%	2.6%	2.6%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£13.4	£16.2	£18.5	£21.8	£25.6
Benchmark turnover of existing and committed facilities	£16.4	£17.3	£19.1	£20.9	£22.8
Residual expenditure	-£3.0	-£1.1	-£0.6	£0.9	£2.8
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	-595	-204	-103	138	404

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13c: COMPARISON GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£556.4	£600.1	£683.6	£804.8	£948.4
Turnover from study area	£13.3	£14.2	£16.0	£18.7	£21.9
Market share	2.4%	2.4%	2.3%	2.3%	2.3%
Expenditure inflow	£0.5	£0.6	£0.6	£0.7	£0.9
Total turnover potential	£13.8	£14.7	£16.7	£19.5	£22.8
Benchmark turnover of existing and committed facilities	£13.8	£14.6	£16.1	£17.6	£19.2
Residual expenditure	£0.0	£0.2	£0.6	£1.9	£3.6
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	36	106	299	512

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13d: COMPARISON GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£556.4	£600.1	£683.6	£804.8	£948.4
Turnover from study area	£3.5	£3.7	£4.2	£4.9	£5.7
Market share	0.6%	0.6%	0.6%	0.6%	0.6%
Expenditure inflow	£0.3	£0.3	£0.3	£0.4	£0.5
Total turnover potential	£3.7	£4.0	£4.5	£5.3	£6.2
Benchmark turnover of existing and committed facilities	£3.7	£3.9	£4.3	£4.8	£5.2
Residual expenditure	£0.0	£0.1	£0.2	£0.5	£1.0
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	11	31	84	143

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13e: COMPARISON GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£556.4	£600.1	£683.6	£804.8	£948.4
Turnover from study area	£6.8	£7.4	£8.6	£10.4	£12.4
Market share	1.2%	1.2%	1.3%	1.3%	1.3%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£7.4	£8.0	£9.3	£11.2	£13.4
Benchmark turnover of existing and committed facilities	£7.4	£7.8	£8.6	£9.4	£10.3
Residual expenditure	£0.0	£0.2	£0.7	£1.8	£3.1
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	40	121	278	448

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

Appendix F
Quantitative need assessment (11,500 dwellings – Option B)

TABLE 12a: CONVENIENCE GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.0	£374.1	£393.9	£419.2	£443.4
Turnover from study area	£101.3	£102.7	£108.3	£115.5	£122.4
Market share	27.4%	27.5%	27.5%	27.6%	27.6%
Expenditure inflow	£7.1	£7.2	£7.6	£8.1	£8.6
Total turnover potential	£108.3	£109.9	£115.9	£123.6	£130.9
Benchmark turnover of existing and committed facilities	£105.1	£105.44	£106.18	£107.25	£108.32
Residual expenditure	£3.2	£4.5	£9.7	£16.4	£22.6
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	268	371	804	1337	1828

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12b: CONVENIENCE GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.0	£374.1	£393.9	£419.2	£443.4
Turnover from study area	£40.2	£40.7	£42.8	£45.4	£48.0
Market share	10.9%	10.9%	10.9%	10.8%	10.8%
Expenditure inflow	£2.6	£2.6	£2.8	£3.0	£3.1
Total turnover potential	£42.9	£43.4	£45.6	£48.4	£51.1
Benchmark turnover of existing and committed facilities	£46.4	£46.5	£46.8	£47.3	£47.8
Residual expenditure	-£3.5	-£3.1	-£1.2	£1.1	£3.3
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-292	-258	-102	90	267

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12c: CONVENIENCE GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.0	£374.1	£393.9	£419.2	£443.4
Turnover from study area	£20.5	£20.8	£21.7	£22.9	£24.1
Market share	5.6%	5.5%	5.5%	5.5%	5.4%
Expenditure inflow	£1.3	£1.3	£1.4	£1.5	£1.6
Total turnover potential	£21.9	£22.1	£23.1	£24.4	£25.7
Benchmark turnover of existing and committed facilities	£18.6	£18.6	£18.8	£19.0	£19.2
Residual expenditure	£3.3	£3.5	£4.3	£5.5	£6.5
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	274	287	358	446	527

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12d: CONVENIENCE GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.0	£374.1	£393.9	£419.2	£443.4
Turnover from study area	£9.2	£9.3	£9.7	£10.2	£10.7
Market share	2.5%	2.5%	2.5%	2.4%	2.4%
Expenditure inflow	£0.8	£0.8	£0.9	£0.9	£1.0
Total turnover potential	£10.0	£10.1	£10.6	£11.1	£11.7
Benchmark turnover of existing and committed facilities	£6.5	£6.5	£6.5	£6.6	£6.6
Residual expenditure	£3.5	£3.6	£4.0	£4.6	£5.1
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	295	302	334	373	410

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 12e: CONVENIENCE GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available convenience goods expenditure	£369.0	£374.1	£393.9	£419.2	£443.4
Turnover from study area	£9.4	£9.9	£11.2	£12.8	£14.3
Market share	2.5%	2.6%	2.8%	3.0%	3.2%
Expenditure inflow	£0.8	£0.9	£1.0	£1.1	£1.3
Total turnover potential	£10.2	£10.8	£12.2	£13.9	£15.6
Benchmark turnover of existing and committed facilities	£11.0	£11.1	£11.1	£11.2	£11.4
Residual expenditure	-£0.8	-£0.3	£1.0	£2.7	£4.2
Indicative sales density for new convenience goods floorspace (£/sq m)	£12,000	£12,036	£12,121	£12,242	£12,365
Indicative retail floorspace capacity (sq m net)	-66	-25	86	218	343

Notes:

Total expenditure taken from Table 4.

Turnover from study area taken from Tables 7a-7e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13a: COMPARISON GOODS CAPACITY, 2013-2031

Stroud

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.4	£600.0	£683.4	£804.4	£947.7
Turnover from study area	£97.0	£104.1	£118.9	£140.4	£165.7
Market share	17.3%	17.4%	17.4%	17.4%	17.5%
Expenditure inflow	£5.8	£6.2	£7.1	£8.4	£9.9
Total turnover potential	£102.8	£110.4	£126.0	£148.8	£175.7
Benchmark turnover of existing and committed facilities	£102.8	£108.4	£119.6	£130.9	£143.1
Residual expenditure	£0.0	£1.9	£6.4	£17.9	£32.5
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	363	1103	2807	4675

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13b: COMPARISON GOODS CAPACITY, 2013-2031

Cam & Dursley

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.4	£600.0	£683.4	£804.4	£947.7
Turnover from study area	£12.9	£15.6	£17.8	£20.9	£24.6
Market share	2.3%	2.6%	2.6%	2.6%	2.6%
Expenditure inflow	£0.5	£0.6	£0.7	£0.8	£1.0
Total turnover potential	£13.4	£16.2	£18.5	£21.8	£25.6
Benchmark turnover of existing and committed facilities	£16.4	£17.3	£19.0	£20.8	£22.8
Residual expenditure	-£3.0	-£1.0	-£0.6	£0.9	£2.9
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	-595	-195	-95	146	411

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13c: COMPARISON GOODS CAPACITY, 2013-2031

Nailsworth

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.4	£600.0	£683.4	£804.4	£947.7
Turnover from study area	£13.3	£14.2	£16.0	£18.7	£21.8
Market share	2.4%	2.4%	2.3%	2.3%	2.3%
Expenditure inflow	£0.5	£0.6	£0.6	£0.7	£0.9
Total turnover potential	£13.8	£14.7	£16.6	£19.4	£22.7
Benchmark turnover of existing and committed facilities	£13.8	£14.6	£16.1	£17.6	£19.2
Residual expenditure	£0.0	£0.2	£0.6	£1.8	£3.5
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	34	100	288	497

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13d: COMPARISON GOODS CAPACITY, 2013-2031

Wotton-under-Edge

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.4	£600.0	£683.4	£804.4	£947.7
Turnover from study area	£3.5	£3.7	£4.2	£4.9	£5.7
Market share	0.6%	0.6%	0.6%	0.6%	0.6%
Expenditure inflow	£0.3	£0.3	£0.3	£0.4	£0.5
Total turnover potential	£3.7	£4.0	£4.5	£5.3	£6.2
Benchmark turnover of existing and committed facilities	£3.7	£3.9	£4.3	£4.8	£5.2
Residual expenditure	£0.0	£0.1	£0.2	£0.5	£1.0
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	10	29	81	139

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

2011 PRICES

TABLE 13e: COMPARISON GOODS CAPACITY, 2013-2031

Stonehouse

	2013	2016	2021	2026	2031
Available comparison goods expenditure	£559.4	£600.0	£683.4	£804.4	£947.7
Turnover from study area	£6.9	£7.6	£9.1	£11.3	£13.9
Market share	1.2%	1.3%	1.3%	1.4%	1.5%
Expenditure inflow	£0.6	£0.6	£0.7	£0.9	£1.1
Total turnover potential	£7.5	£8.2	£9.9	£12.2	£15.0
Benchmark turnover of existing and committed facilities	£7.5	£7.9	£8.7	£9.5	£10.4
Residual expenditure	£0.0	£0.3	£1.2	£2.7	£4.6
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,000	£5,275	£5,818	£6,367	£6,961
Indicative retail floorspace capacity (sq m net)	0	65	201	427	668

Notes:

Total expenditure taken from Table 5f.

Turnover from study area taken from Tables 9a-9e.

Market share is the turnover from study area expressed as a percentage of total available expenditure

Expenditure inflow based on assumptions made in 2010 Retail Study.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover at 2013 assumed to match total turnover potential, projected forward assuming a growth in efficiency of 0.1%pa 2013-19 and 0.2%pa 2020-2031.

Sales density for new floorspace is indicative only and reference should also be made the turnover of individual proposals.

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