

# **Retail / Town Centre Planning Policy Advice**

Stroud District Council

April 2021

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# 1. Introduction

- 1.1 This report has been prepared by Avison Young ('AY') for Stroud District Council ('the Council') in relation to retail and town centre planning policy issues in order to inform the Stroud District Local Plan Review ('the Local Plan Review'). The Council is in the process of consulting on the content of the Local Plan Review and has identified the need for updated advice and analysis in relation to the following areas:
- an update in relation to national planning policy and legislation insofar as retail and town centre land uses are concerned.
  - re-visiting the previous assessments of need for retail floorspace across Stroud District.
  - a summary of recent / current trends in the retail sector.
  - advice on the content of retail and town centre planning policies in the Local Plan Review.
- 1.2 The current development plan in Stroud District comprises the Stroud District Local Plan, which was adopted by the Council in November 2015. The evidence base for the adopted plan includes three retail studies, prepared in 2010, 2013 and 2017: the Stroud District Town Centres and Retailing Study (2010) ('the 2010 Study'); the Stroud Retail Study Update 2013 ('the 2013 Study') and The Future of Town Centres 2017 ('the 2017' study). These studies provided a comprehensive review of town centre health, retail floorspace need, potential development site assessments and planning policy advice. Due to the time which has elapsed since the 2013 and 2017 studies, the Council has asked AY to prepare this report to support the Local Plan Review, concentrating upon the material changes which have occurred since the preparation of the previous studies.
- 1.3 A particular focus for this study has been the on-going challenges facing the retail sector in the UK, which have been exacerbated in 2020 and 2021 by the advent of the COVID-19 pandemic. A review has also been undertaken of the changes in retail provision, focusing upon recent development proposals.
- 1.4 Given that the preparation of this study has been undertaken during the COVID-19 pandemic, AY and the Council have agreed to focus on a number of specific areas which can make a meaningful contribution to the Local Plan Review. Whilst the collection of data relating to land uses in the District's several town centres would, in normal circumstances, make an important contribution to a retail-related evidence base research document, current 'lockdown' measures mean that land use surveys may not be able to accurately ascertain a true picture of town centre health. This aspect will need to be kept under review by the Council, with consideration given to whether future land use surveys are required for the purposes of informing the Local Plan Review.

1.5 The remainder of this document is structured in the following manner:

- Section 2 provides a review of the recent changes and updates to national planning policy and legislation in relation to retail, leisure and main town centre land use issues.
- In order to provide up to date information and analysis on the trends which are affecting retailing and town centres, Section 3 provides a review of salient issues for the retail sector (including the emerging effects of the COVID-19 pandemic).
- In Section 4 we re-visit our previous assessments of the need for retail floorspace across Stroud District.
- In response to the changing national policy and legislative landscape, Section 5 provides a series of advice in relation to potential updates / refinements to planning policies in the Stroud Local Plan Review.
- Finally, in Section 6, we provide a summary of the contents of this report and our advice / recommendations to the Council.

## 2. Planning Policy Context

### **The National Planning Policy Framework ('NPPF') (February 2019)**

2.1 At the time of the 2013 and 2017 studies, the original 2012 version of the NPPF remained the source of national planning policy. However, the NPPF has since been revised (in July 2018) and was updated again in February 2019. Therefore, it is important to record the changes in national policy since the completion of previous evidence base documents in order that it can inform advice on local development plan retail and town centre planning policies for the Local Plan Review.

2.2 The changes between the 2012 and 2018/2019 versions of the NPPF, insofar as they relate to retail and town centre issues, are as follows:

- Whilst the two main policy tests for proposals outside of town centres (and not in accordance with an up to date development plan) remain the sequential and impact tests, the 2018 and 2019 versions of the NPPF have clarified the issue of availability of alternative sites (in the sequential test) as being available within 'a reasonable period of time'. However, there is no definition (or guidance) as to what is 'a reasonable period of time' in the context of proposals for main town centre uses.
- The 2018/2019 revisions to the NPPF have deleted the formal requirement for local authorities to define primary and secondary retail frontages in the development plans. The latest NPPF still requires local authorities to define town centre boundaries and primary shopping areas.
- Whilst the requirement to allocate sites to meet identified needs remains, the revised NPPF indicates that this should be at least ten years ahead, rather than the full plan period as previously advised.
- The revised NPPF does not now provide any guidance on how 'needs' should be assessed for main town centre uses (previously quantitative and qualitative indicators were cited).

### **National Planning Practice Guidance ('NPPG')**

2.3 Following initial publication in 2014, the NPPG on town centre planning policy was updated in July 2019 and again in September 2020. The latest version sets out the recommended content of town centre strategies, the indicators which are useful for planning for town centres and high streets, the permitted development rights which are available in relation to main town centre uses and also how local authorities should approach the application of the sequential and impact tests in terms of both plan making and development management issues. The NPPG also provides guidance on setting a locally

appropriate impact assessment threshold which is considered in further detail in Section 7 of this document.

## Other Considerations

### *Permitted Development and the Use Classes Order*

2.4 In recent years, and in response to the on-going challenges faced by town centres and high street retailers (and other commercial uses), national government has introduced more flexibility into the permitted development rights system. Permitted development has long been an element of the planning system in England although, over time, further flexibility has been introduced in order to allow for changes, in certain circumstances, between some main town centre land use classes. A summary of the current permitted development rights<sup>1</sup> is contained in Table 2.1 below.

*Table 2.1: summary of permitted change of use rights*

| From  | To  |
|---|---|
| <b>A1</b> (shops)   | <ul style="list-style-type: none"> <li>• <b>A2</b></li> <li>• <b>A3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>B1(a)</b> up to 500m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>C3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>D2</b> up to 200m<sup>2</sup> and subject to Prior Approval and only if the premises was in A1 use on 5th December 2013</li> <li>• A <b>mixed use</b> comprising an A1 or A2 use and up to two flats may also be permitted subject to meeting certain conditions</li> </ul> |
| <b>A2</b> (professional and financial services)                           | <ul style="list-style-type: none"> <li>• <b>A1</b></li> <li>• <b>A3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>B1(a)</b> up to 500m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>C3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>D2</b> subject to Prior Approval and only if the premises was in A2 use on 5th December 2013</li> <li>• A <b>mixed use</b> comprising an A1 or A2 use and up to two flats may also be permitted subject to meeting certain conditions</li> </ul>                            |
| <b>A3</b> (restaurants and cafes)   | <b>A1</b> or <b>A2</b>  |
| <b>A4</b> (drinking establishments)                                       | <b>A4</b> (drinking establishment) with <b>A3</b> (restaurants and cafes)   |
| <b>A4</b> (drinking establishment) with <b>A3</b> (restaurants and cafes) | <b>A4</b> (drinking establishments)   |
| <b>A5</b> (hot food takeaways)  | <ul style="list-style-type: none"> <li>• <b>A1</b> or <b>A2</b> or <b>A3</b></li> <li>• <b>B1(a)</b> up to 500m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>C3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> </ul>  |
| <b>B1(a)</b> (business - offices)   | <ul style="list-style-type: none"> <li>• <b>B8</b> up to 500m<sup>2</sup></li> <li>• <b>C3</b> subject to Prior Approval</li> <li>• <b>State-funded school or registered nursery</b> subject to Prior Approval</li> </ul>   |
| <b>B1(b)</b> (business - research and development)                        | <ul style="list-style-type: none"> <li>• <b>B8</b> up to 500m<sup>2</sup></li> <li>• <b>State-funded school or registered nursery</b> subject to Prior Approval</li> </ul>  |
| <b>B1(c)</b> (business - light industrial)                                | <ul style="list-style-type: none"> <li>• <b>B8</b> up to 500m<sup>2</sup></li> </ul>  |

<sup>1</sup> **Please note in regard to changes to Use Classes from 1 September 2020:** For any reference to permitted development rights, and for restrictions to them or applications for prior approval, the Use Classes in effect prior to 1 September 2020 will be the ones used until the end of July 2021 (this is defined as the 'material period' in legislation so may be referred to as such).

|  |   |
|--|---|
|  | <ul style="list-style-type: none"> <li>• <b>C3</b> up to 500m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>State-funded school or registered nursery</b> subject to Prior Approval</li> </ul>  |
| <b>B2</b> (general industrial)   | <ul style="list-style-type: none"> <li>• <b>B1</b></li> <li>• <b>B8</b> up to 500m<sup>2</sup></li> </ul>   |
| <b>B8</b> (storage and distribution)   | <ul style="list-style-type: none"> <li>• <b>B1</b> up to 500m<sup>2</sup></li> </ul>  |
| <b>C1</b> (hotels)   | <b>State-funded school or registered nursery</b> subject to Prior Approval  |
| <b>C2</b> (residential institutions)<br>/ <b>C2A</b> (secure residential institutions) | <b>State-funded school or registered nursery</b> subject to Prior Approval  |
| <b>C3</b> (dwellinghouses)   | <b>C4</b> (small houses in multiple occupation)   |
| <b>C4</b> (small houses in multiple occupation)  | <b>C3</b> (dwellinghouses)  |
| <b>D2</b> (assembly and leisure)   | <b>State-funded school or registered nursery</b> subject to Prior Approval  |
| <b>Sui generis</b> (agricultural buildings)  | <b>A1, A2, A3, B1, B8, C1, C3, D2, State-funded school or registered nursery</b> , all subject to meeting relevant criteria and Prior Approval. See notes below.  |
| <b>Sui generis</b> (amusement arcade/centre)   | <b>C3</b> up to 150m <sup>2</sup> and subject to Prior Approval   |
| <b>Sui generis</b> (betting offices and pay day loan shops)                            | <ul style="list-style-type: none"> <li>• <b>A1</b></li> <li>• <b>A2</b></li> <li>• <b>A3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>B1(a)</b> up to 500m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>C3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> <li>• A <b>mixed use</b> comprising a betting office or a pay day loan shop, or an A1 or A2 use and up to two flats may also be permitted subject to meeting certain conditions.</li> <li>• <b>D2</b> up to 200m<sup>2</sup> and subject to Prior Approval</li> </ul> |
| <b>Sui generis</b> (casinos)   | <ul style="list-style-type: none"> <li>• <b>A3</b> only if existing building is under 150m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>C3</b> up to 150m<sup>2</sup> and subject to Prior Approval.</li> <li>• <b>D2</b></li> </ul>   |
| <b>Sui Generis</b> (laundrette)  | <ul style="list-style-type: none"> <li>• <b>B1(a)</b> up to 500m<sup>2</sup> and subject to Prior Approval</li> <li>• <b>C3</b> up to 150m<sup>2</sup> and subject to Prior Approval</li> </ul>   |

2.5 However, in July 2020, the government introduced a significant change to the land use classes order. The changes came into effect on the 1<sup>st</sup> September 2020 and revoked Parts A and D of the existing use classes order. A note summarising these changes can be found in Appendix I.

2.6 In relation to retail and main town centre uses the changes will be as follows:

- A new Class E is to be introduced which will encompass the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities)<sup>2</sup>.
- The former A4 and A5 uses will now become sui generis uses, as will part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls. The remaining former Class D2 uses (community halls, swimming pools, skating rinks and outdoor sport and recreation uses) are now placed into Use Class F2.

<sup>2</sup> Not involving vehicles or firearms

- The uses within the former Class D1 are split between the new Use Class E (health care uses, creches, day centres) and the new Use Class F1 (schools, museums, libraries, halls courts and places of worship).

2.7 These changes will have implications for the formulation of development management policies in the Local Plan Review and are discussed in more detail later in this document.



### 3. Retail / Town Centre Trends

#### Introduction

3.1 A common and necessary introductory part of any retail and town centres evidence base study is to set the context in terms of recent, current and potential future trends in the economy. This section of the study provides this analysis, although the on-going and uncertain effects of the world-wide COVID-19 pandemic mean that forecasts may be subject to change due to the fast-moving circumstances of the pandemic. Therefore, this section provides the following information and analysis:

- The potential scenarios for the UK economy as a consequence of the COVID-19 pandemic;
- A review of the prospects for the UK economy and retailing in pre-COVID-19 'normal' circumstances; and
- Information on how the COVID-19 pandemic is affecting retailing and town centres.

3.2 Prior to the outbreak of COVID-19 in the UK, the UK economy slowed over 2019, with growth sliding to a 7 year low by the end of the year. The period was dominated by heightened Brexit uncertainty and a weaker global economy. Against this backdrop, business investment declined for the second year in a row and exports remained sluggish. Consumer spending also lost momentum, reflecting low confidence and lacklustre incomes growth. The outcome of the December 2019 general election removed near-term political uncertainty, empowering the government to push forward with spending pledges and EU withdrawal plans. At the start of 2020, the latest indicators pointed to a pick-up in business confidence and investment intentions. Housing market surveys also suggested that activity had been rebounding and consumer sentiment had also improved.

3.3 On the global front, a partial easing in trade disputes and loosening in monetary policy was encouraging. That said, lingering uncertainty over the outcome of the next phase of Brexit negotiations had expected to curb the pace of any investment recovery. Forecasts from Experian assumed an orderly transition to a new free trade agreement, but significant risks remain around the process, not least because of the extremely tight timetable (and now heightened by COVID-19). At the time of finalising this report, a post-Brexit deal has been reached which has improved business confidence, although early 'teething problems' and the need for businesses to become used to the new arrangements are likely to have an effect on trading conditions through 2021. Alongside this, forecasts on the recovery in consumer spending predict it to remain muted, reflecting modest incomes growth. Against this backdrop, GDP growth was predicted to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years.

## COVID-19

- 3.4 The advent of COVID-19 has, and continues to have, a huge effect on all aspects of life around the world. Given that the full implications of COVID-19 are not yet able to be fully understood and predicted, Experian have outlined, in 2020, four potential scenarios and their potential characteristics. Experian's analysis and the various scenarios are outlined below.
- 3.5 The outbreak of COVID-19 will have a considerable impact on the UK and global economies. Due to the unprecedented nature of the event and absence of hard data, it is impossible at this point to be confident of the scale and duration of the outbreak and the economic consequences of the measures to limit contagion. Hence, all forecasts will be subject to greater than usual uncertainty and volatility.
- 3.6 Based upon forecasts released in 2020, Experian's view is that the V-shape cases outlined below are, on-balance, the more likely trajectories based on the scale of response from the UK and other governments. However, it should be noted from the outset of this analysis that the UK and global economy has never experienced a pandemic such as this in modern times and the situation remains fast-moving. Indeed, whilst the UK started to ease certain 'lockdown' measures in June and July 2020, including the re-opening of non-essential shops (in controlled conditions), a second wave of infections in Autumn/Winter 2020 occurred and another 'lockdown' was imposed. As a consequence, the content of this analysis should be seen as 'a point in time' and it will be important for the Council to keep matters under review during the life of preparing the Local Plan Partial Update.
- 3.7 The scenarios provided by Experian assume that the government follows the Imperial College ('ICL') recommendations for an Adaptive Suppression approach to managing the epidemic. This would involve an intensive period where a number of interventions (case isolation, household quarantine, social distancing of the whole population and closure of schools and universities) would be implemented until the number of cases falls below an acceptable threshold.
- 3.8 ICL recommended maintaining these interventions for 5 months, which is assumed to be followed in all scenarios except the V-shape case (3 months). To support the effectiveness of the suppression measures, the government has enforced periods of 'lockdown' involving the temporary closure of non-essential businesses and activities. Thereafter, it would be possible to relax these measures as long as hospital cases remained below a target threshold.

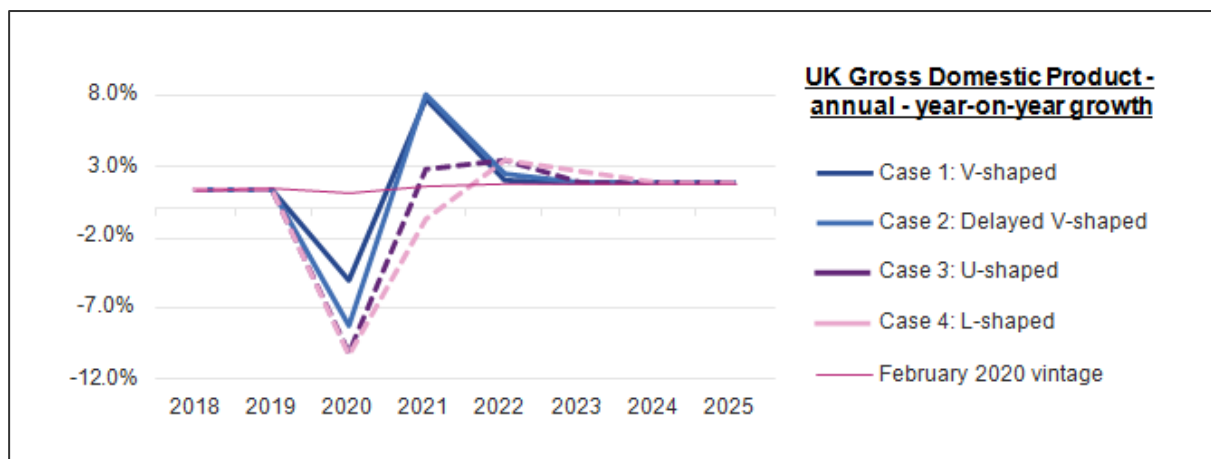
### *Scenario Overview*

- 3.9 Figure 3.1 below shows the various forecast scenarios for year-on-year growth in UK Gross Domestic Product ('GDP') up until 2025. In cases 1 and 2, the COVID-19 outbreak is contained relatively swiftly allowing GDP to rebound strongly in a V-shape following a sharp decline in Q2, with minimal long-term

scarring. Case 3 has the virus contained in the same timeframe as case 2, however the economic impacts are more severe due to additional shocks arising from a tightening in credit conditions and further declines in Sterling. This results in a U-shaped, rather than V-shaped recovery. In case 4, the scale of the credit crunch and the Sterling declines are significantly deeper. As the economy emerges from the severe containment phase, it enters an extended period of stagnation/very subdued growth.

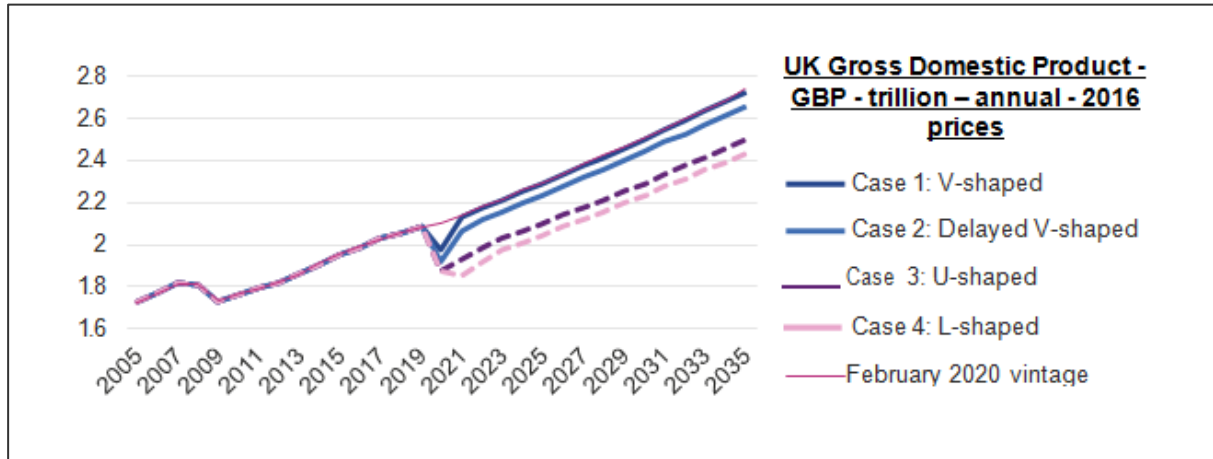
3.10 However, it should be noted that these forecasts were released by Experian earlier in 2020 and the imposition of another period of lockdown is likely to have put back the period for recovery. As a consequence, the timeframes outlined below may need to be put back several months the advent of a number of potential new vaccines may well assist with the recovery process.

Figure 3.1: forecast UK GDP per annum



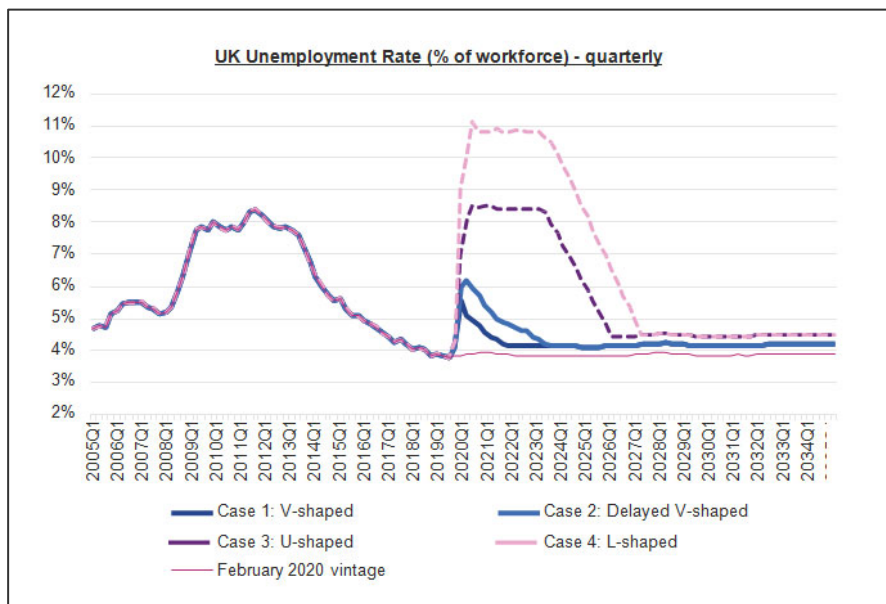
3.11 In levels terms, the lost output in the first half of 2020 is quickly recovered in the first two cases. However, it persistently lags behind where Experian were projecting in their February 2020 forecast. The U and L shaped cases show a more gradual recovery. In the former, it takes roughly five years for all lost output to be recovered, broadly in line with the experience following the global financial crisis. In the latter, it takes longer still.

Figure 3.2: GDP growth



- 3.12 The government has announced a range of measures to mitigate the impact on households and businesses and, at the time of writing, it appears that further policies may follow.
- 3.13 In cases 1 & 2, the fiscal response is expected to successfully rein in the rate of job shedding.
- 3.14 The unemployment rate is anticipated to rise sharply and substantially in the second quarter of the year, as a range of sectors of the economy such as retail, leisure and hospitality, reduce staff.
- 3.15 In cases 3 and 4, the government measures to protect jobs are assumed to be far less successful, and the unemployment rate holds stubbornly high.

Figure 3.3: forecast UK employment rate



*Scenario 1: V Shaped Recovery*

- 3.16 In this case, the suppression policy goals are achieved faster than the ICL's estimates and the timescales around securing a vaccine are also at the optimistic end of the estimates. Technology and infrastructure are sufficiently enhanced to enable speedy tracking and response times, so infection rates stay low and incidents remain localised. Wholesale suppression strategies are avoided and intensive global efforts secure a vaccine with sufficient stockpiles built to begin rollout to the 'at-risk' population group before the end of 2020.
- 3.17 In this scenario, the economic impacts are limited by the optimistic timeframes involved in bringing the epidemic under control. The reduction in infection rates triggers a swift rebound in investor, business and consumer confidence. Financial markets rebound and Sterling recovers. The tightening in credit conditions proves mild and short lived. Alongside this, mitigation efforts by the government prevent large scale job shedding and business insolvencies, which enables activity to recover relatively swiftly as workers return to normal working hours, businesses re-open and delayed investments are restarted.
- 3.18 Since devising this scenario, experience throughout 2020 has indicated that it was too optimistic in a number of areas and can now be largely discounted.

*Scenario 2: Delayed V Shaped Recovery*

- 3.19 In this case, the suppression policy adopted is in line with the ICL's recommendations for 5 months of intensive action. Also, the timescales around securing a vaccine are at the midpoint of the range of the ICL's estimates of 12 to 18 months. Numbers infected reduce rapidly and suppression measures begin to unwind, with the resurgence of cases well controlled. Technology and infrastructure are sufficiently enhanced to enable speedy tracking and response times, so infection rates stay low and incidents remain localised.
- 3.20 Wholesale suppression strategies are avoided and intensive global efforts secure a vaccine and sufficient stockpiles are built to begin rollout to the 'at-risk' population group by the end of 2020. The economic impacts vary from the V-shape case in the following ways:
- 3.21 The longer containment period leaves confidence subdued for longer in 2020, resulting in weaker outcomes for consumer spending and business investment.
- 3.22 The impact of government mitigation policies has a fair amount of success. A tightening in credit conditions proves mild and short lived, while Sterling stabilises. However, due to the longer containment period there are more job losses and business insolvencies than the V-shape case.

- 3.23 The economic recovery is V-shaped but postponed until 2021. The relatively longer period of weakness results in greater scarring than the V Shape case.

*Scenario 3: U Shaped Recovery*

- 3.24 In this case, the timescales for addressing the pandemic threat are the same as the Delayed V-shape recovery case, but the economic impacts are more severe due to additional shocks arising from a tightening in credit conditions and further declines in Sterling. The suppression policy adopted is in line with the ICL's recommendations for 5 months of intensive action. Also, the timescales around securing a vaccine are at the midpoint of the range of the ICL's estimates of 12 to 18 months.

*Scenario 4: L Shaped Recovery*

- 3.25 The main difference between this and the U-shape case is that the scale of the credit crunch and Sterling decline is significantly deeper. The assumptions around the timescales for bringing the pandemic under control remain similar. In this case, as the economy emerges from the severe containment phase, it enters an extended period of stagnation/very subdued growth.

### **Consumer spending**

- 3.26 Household spending growth slowed to an 8 year low of 1.2% in 2019. Consumer appetite for durables, property and, in particular, cars was notably muted. Low confidence was a major drag, but tepid growth in household incomes was also a factor behind the lacklustre spending trend. Despite another year of robust labour market conditions, with over 300,000 jobs created, incomes growth averaged a disappointing 1% in 2019. A pick-up in wage growth and receding inflation also provided a boost to earnings growth. However, this was offset by a continued squeeze in welfare benefits and other incomes sources. Looking ahead, prospects for incomes remain mixed. A positive is the very benign inflation backdrop. Combined with the boost to wages from more generous public sector pay and uprating to the National Living Wage, the recovery in real wages should remain intact over the coming year. However, this will be offset by a projected slowdown in the pace of job creation to more sustainable levels. Another positive factor is the end of the freeze on working-age benefits, but the on-going roll out of other welfare reforms will continue to bite. Given this, real incomes are projected to average 1.3% this year and consumer spending growth will remain in sub-1.5% territory.

*Retail*

- 3.27 Retail sales volumes grew by 3% in 2019, the weakest reading since 2014. There was a marked slowdown in growth over the course of the year, reflecting low confidence and sluggish incomes. The weakening trend was concentrated in non-food stores, which started the year with growth above 4% and ended with declines not seen since early 2012. Department stores and household goods retailers

bore the brunt, suffering from a fall in sales of durable goods. Demand for household goods has suffered as the housing market remained in the doldrums for a second year. In contrast, sales from predominantly on-line retailers picked up momentum with growth rising to 15%, compared with 10% in 2018. As a consequence, even before the advent of COVID-19, prospects for retail sales remained subdued. Household incomes gains were set to remain modest in 2020 although whilst the government's furlough scheme has been hugely ambitious, incomes since March 2020 have been impacted significantly with job losses becoming significant (as certain sectors experience extreme impact on how COVID-19 affects businesses).

*Medium term outlook*

- 3.28 The UK left the EU on January 31st 2020 and entered a transition period which allowed continued access to the European single market while the next phase of negotiations take place. The transition period ended in December 2020 and a trade deal was struck at the end of this period.
- 3.29 Experian's forecasts assume an orderly adjustment to the new trading environment. As Brexit related uncertainty ends, business investment should recover. However, the resultant increase in trade barriers will result in lower productivity and export performance than would have otherwise been the case.
- 3.30 Alongside this, Experian predict that fiscal policy will be more supportive than over the past decade. The baseline forecasts only incorporate announced policy so there is scope for upside from the March 2020 Budget. The government's increased majority should clear the path for it to push forward with policy priorities on regional development, infrastructure and health.
- 3.31 At the present time, Experian have not revised their projections for productivity and potential GDP growth, which drive the outlook over the medium/longer term. For the 2022-26 period overall, GDP growth is expected to average 1.8% per annum, compared with 2.0% during 2010 to 2018 and 2.6% from 1981 to 2007. Alongside this, the consumer spending outlook is little changed, forecast to average 1.8%, with retail sales averaging 2.7%.

*Long term outlook*

- 3.32 The final terms of the new economic relationship between the EU and the UK remain a major consideration for the long term outlook and Experian's assumptions on this front are little changed from previous years. The baseline forecasts from Experian assume that the UK will continue to have access to the single market under the new arrangement. However, it is unlikely that the new terms will be as favourable as full EU membership, which in turn impacts the long term outlook for trade, investment and GDP.

- 3.33 Population is forecast to expand on average 0.3% per annum over 2030-2040, which is below the average of 0.8% observed during 2005-2016. Productivity growth is expected to recover from recent lows to 1.4%, but will be well below the 2.4% averaged in the decade preceding the last recession. Given this, our long term GDP growth forecast remains at around 1.7%, below the historic long-term trend growth of 2.3%.
- 3.34 Revisions to the consumer spending outlook are minimal, with long term growth forecast at 2.2%, underpinned by gains in population and household incomes. However, downside risks clearly exist from a more marked slowdown in EU migration than projected.
- 3.35 The expansion in comparison goods volumes, averaging 3% per head to 2040 will be similar to the preceding decade but less buoyant than historic trends as key factors that boosted growth, notably the globalisation that subdued audio visual prices significantly, will not be repeated to the same degree.
- 3.36 Per head spending on convenience goods has slowed sharply in the last couple of years. Experian project that growth will remain a modest 0.1% over the long term, which is weaker than experienced in recent years but an improvement on the historic trend of annual 1% declines during 2000-2019.
- 3.37 With regards to retail expenditure, it is useful to compare the forecast annual changes in spending per head on convenience and comparison goods from the time of the 2017 Study and the latest available forecasts from Experian. Table 3.1 below shows the year-on-year change from Experian's Retail Planner Briefing Note 13<sup>3</sup> for 2016-2031, which was referenced in the 2017 Study, and compares this against the latest forecasts from Experian's Retail Planner Briefing Note 18<sup>4</sup> for the same time period.
- 3.38 Table 3.1 indicates that the latest Experian forecasts are showing a higher rate of growth in per capita convenience goods spending: +7.7% up to 2031, compared with +1.9% from the time of the 2017 Study. Whilst this is in part due to higher levels of actual growth between 2016 and 2018, the impact of the COVID-19 pandemic has also had an influence, with consumers switching spending from 'out of the house' food and beverage visits and some comparison goods shopping to convenience goods retailing.

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<sup>3</sup> 2015

<sup>4</sup> October 2020



Table 3.1: forecast year-on-year change in per capita convenience goods spending between 2016 and 2031

| Year                     | 2017 Study (%) | Update Study (%) |
|--------------------------|----------------|------------------|
| 2016                     | 0.1            | 3.3              |
| 2017                     | 0.3            | 1.9              |
| 2018                     | 0.2            | 1.0              |
| 2019                     | 0.2            | -0.9             |
| 2020                     | 0.1            | 8.4              |
| 2021                     | 0.1            | -6.2             |
| 2022                     | -0.1           | 0.2              |
| 2023                     | 0.1            | 0.0              |
| 2024                     | 0.2            | 0.1              |
| 2025                     | 0.1            | 0.1              |
| 2026                     | 0.1            | 0.0              |
| 2027                     | 0.1            | -0.1             |
| 2028                     | 0.1            | 0.0              |
| 2029                     | 0.1            | 0.0              |
| 2030                     | 0.1            | -0.1             |
| 2031                     | 0.1            | 0.0              |
| <b>Change, 2016-2031</b> | <b>+1.9%</b>   | <b>+7.7%</b>     |

Source: Experian Retail Planner Briefing Notes 13 and 18

3.39 Table 3.2 undertakes a similar exercise for comparison goods per capita expenditure, using the same Experian Retail Planner Briefing Notes.

Table 3.2: forecast year-on-year change in all per capita comparison goods spending between 2016 and 2031

| Year                     | 2017 Study (%) | Update Study (%) |
|--------------------------|----------------|------------------|
| 2016                     | 3.2            | 4.8              |
| 2017                     | 2.9            | 5.4              |
| 2018                     | 2.7            | 3.4              |
| 2019                     | 2.8            | 4.3              |
| 2020                     | 3.0            | -8.5             |
| 2021                     | 3.2            | 6.5              |
| 2022                     | 3.1            | 3.8              |
| 2023                     | 3.3            | 3.6              |
| 2024                     | 3.3            | 2.9              |
| 2025                     | 3.1            | 2.8              |
| 2026                     | 3.1            | 2.9              |
| 2027                     | 3.2            | 2.9              |
| 2028                     | 3.1            | 2.8              |
| 2029                     | 3.2            | 2.9              |
| 2030                     | 3.3            | 2.9              |
| 2031                     | 3.2            | 2.9              |
| <b>Change, 2016-2031</b> | <b>+49.7%</b>  | <b>+46.3%</b>    |

Source: Experian Retail Planner Briefing Notes 15 and 18

3.40 The above data shows very little difference between the total comparison goods (per capita) expenditure forecasts referred to in the 2017 Study and the latest Experian forecasts. Growth up to 2031 (from 2016 levels) is now forecast to be slightly lower, at +46.3%. However, as the data in Table 3.3 below shows, when spending on comparison goods via purely internet-based sales is stripped out of the forecasts then the differences are significant. At the time of the 2017 Study, per capita spending via physical comparison goods stores (including internet-related sales associated with physical stores) was forecast to rise by circa +46% up to 2031. However, the latest comparable forecasts published by Experian show that forecast (per capita) expenditure growth up to 2031 will now be much lower at circa +28%.

Table 3.3: forecast year-on-year change in per capita comparison goods spending between 2016 and 2031 (excluding pre internet sales)

| Year                     | 2017 Study (%) | Update Study (%) |
|--------------------------|----------------|------------------|
| 2016                     | 2.4            | 3.1              |
| 2017                     | 2.1            | 3.3              |
| 2018                     | 1.8            | 2.0              |
| 2019                     | 2.1            | 3.4              |
| 2020                     | 2.5            | -14.5            |
| 2021                     | 3.1            | 8.1              |
| 2022                     | 2.9            | 2.9              |
| 2023                     | 3.4            | 2.7              |
| 2024                     | 3.4            | 2.0              |
| 2025                     | 3.2            | 1.9              |
| 2026                     | 3.1            | 2.0              |
| 2027                     | 3.3            | 2.1              |
| 2028                     | 3.1            | 2.3              |
| 2029                     | 3.3            | 2.4              |
| 2030                     | 3.4            | 2.5              |
| 2031                     | 3.3            | 2.5              |
| <b>Change, 2016-2031</b> | <b>+46.4%</b>  | <b>+28.7%</b>    |

Source: Experian Retail Planner Briefing Notes 15 and 18. Figures include spending via the internet which is fulfilled via physical stores.

- 3.41 The continued increasing influence of comparison goods shopping via the internet is demonstrated by the figures in Table 3.4 below which show the rise in market share in this channel. At the time of the 2017 Study, the market share of sales via the internet were forecast to rise from 13.1% in 2017 to 14.6% in 2031. The forecast level of growth to 2031 has now doubled to 27.2%.

Table 3.4: market share of internet sales for comparison goods shopping, 2016-2031

| Year | 2017 Study (%) | Update Study (%) |
|------|----------------|------------------|
| 2016 | 12.4           | 13.9             |
| 2017 | 13.1           | 15.6             |
| 2018 | 13.8           | 16.8             |
| 2019 | 14.4           | 17.5             |
| 2020 | 14.9           | 22.9             |
| 2021 | 15.0           | 21.8             |
| 2022 | 15.2           | 22.5             |
| 2023 | 15.1           | 23.2             |
| 2024 | 15.1           | 24.0             |
| 2025 | 15.0           | 24.6             |
| 2026 | 15.0           | 25.2             |
| 2027 | 14.9           | 25.8             |
| 2028 | 14.8           | 26.2             |
| 2029 | 14.7           | 26.6             |
| 2030 | 14.7           | 26.9             |
| 2031 | 14.6           | 27.2             |

Source: Experian Retail Planner Briefing Notes 15 and 18.

## Retail and Town Centre Trends

### Internet Shopping

3.42 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of the definition known as 'special forms of trading' ('SFT'). Based on ONS data, Experian estimate that:

- The value of internet sales in 2019 was estimated to be £84.1bn (at current prices). This represents a +45% increase from £58bn recorded in 2016. Total non-store retail sales are estimated to amount to some £90.7bn in 2019 and is set to £203bn in 2036.
- To explain the differential in terms of growth between all retailing and internet retailing, in 2019 overall retail growth was 3% whereas internet sales grew by 9.6%. In 2020, overall retail sales are expected to grow by 2.5% whereas internet sales are likely to increase by 7.9%.
- The overall market share of internet sales, as a proportion of total retail sales, has increased nationally from 5.5% in 2006 to 20.2% in 2019. It is forecast by Experian to grow to 22% by 2021 and to 31% by 2036.

- 3.43 In relation to on-line grocery sales, most of the main national grocery businesses (apart from ALDI and Lidl) provide a delivery service, with Marks & Spencer recently entering the market in collaboration with Ocado. The entrance of Ocado to the online market in 2002 made a big impact upon the strategies of the traditional 'big four' grocers and led them accelerate plans for the online channel. Ocado has a different type of operation to the traditional grocers whereby its orders are picked from warehouses (via robotics) whereas most orders from Tesco, ASDA, Waitrose etc are picked by staff in-store. The Ocado business model is very efficient but expensive to invest in initially. The in-store grocery picking system is less costly initially but is generally regarded as a loss-maker.
- 3.44 In 2020 two particular factors have had a key influence on on-line grocery sales. The impact of COVID-19 meant that many people were reluctant to visit shops and the experience of using a foodstore, particularly in the first part of 'lockdown' become inefficient and time-intensive. This led to a significantly higher demand for on-line deliveries which the main grocers found it difficult to keep pace with. However, now that the initial shock has passed, grocers are trying to build in additional capacity and online sales have risen from 7% of the total grocery market at the start of 2020 to 13% by May 2020. Research by UBS in the UK found that 71% of those surveyed will shop as often or more after the COVID-19 situation improves.
- 3.45 The other development in 2020 has been the decision by Amazon to start offering free grocery deliveries to its Prime members. Amazon's grocery offering is sourced from a range of sources including Morrisons, Booths and Whole Foods and is, in due course, likely to add capacity to the delivery network particularly in urban areas. Whilst Amazon customers are paying indirectly for the delivery service, this move does mirror Ocado's entrance into the market although the latter did subsequently introduce charges in line with the other traditional grocery retailers.
- 3.46 The impact of COVID-19 has been even more significant for non-food shopping. Whilst a small amount of stores (classified as essential) remained open (under very strict controls) there has been a very significant shift to on-line sales, albeit subdued due to the furlough scheme and the risk of job losses. Initial data suggests that the initial spike will reduce as physical stores re-open although many commentators consider that the upwards trend in online sales is likely to be reinforced by the impact of COVID-19.

#### *Changing Retailer Requirements*

- 3.47 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies over

the past several years, including new store requirements and existing store formats to keep pace with the dynamic changes in the sector and consumer demand.

- 3.48 This is probably best illustrated by the changes in the grocery sector over the last 6-7 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) shifted earlier this decade to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose), a better customer experience and online sales. In relation to online sales, following the original entrants into the market (Tesco, Ocado, Sainsburys and ASDA), Morrisons joined a few years ago and Marks & Spencer started their own sales (in partnership with Ocado) in September 2020.
- 3.49 Over the past several years applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out. At the other end of the grocery spectrum, the European-led 'deep discount' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. Iceland are also expanding their Food Warehouse format.
- 3.50 In the non-food sector, those retailers that experienced significant growth up to 2007/08 have had to adapt to the very different market conditions over the past dozen or so years. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether, or have significantly reduced their store portfolio in centres across the UK (e.g. Debenhams, House of Fraser and Marks & Spencer). In particular, at the time of preparing this report there were significant concerns over the future of the Debenhams and Arcadia high street chains.
- 3.51 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 25-50' UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing vacancies. The continuation of these trends will impact on

future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

- 3.52 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, TK Maxx, John Lewis and Marks & Spencer have been seeking larger out of centre format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology.
- 3.53 As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave of store closures. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.
- 3.54 The on-going challenging environment facing the comparison goods sector has been exacerbated by the impact of the COVID-19 pandemic and the lockdown periods imposed in March/April 2020 and in early 2021. Many comparison goods stores were classified as non-essential shops and have only recently re-opened (in April 2021). Whilst a significant element of sales transferred on-line (to those retailers who had a good online sales platform) overall sales have been affected considerably. Data for July 2020 indicates that some retailers experienced a good initial 'bounce' back, although the recent lockdown will no doubt lead to a reversal in fortunes for many businesses. In addition, the experience surrounding comparison goods shopping trips, which were until recently taken as a quasi-leisure activity, has fundamentally changed which, in the short term, is likely to impact upon the attractiveness of town centres.
- 3.55 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

## 4. Need / Capacity Issues

- 4.1 Paragraph 85(d) of the latest version of the NPPF requires local authorities to develop planning policies to allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed. The 2010 Study provided an assessment of quantitative and qualitative retail floorspace needs across all of the main settlements in the District, whilst the 2013 Study updated the quantitative need forecasts to take into account the various housing growth / distribution options in the most recently adopted Local Plan.
- 4.2 In order to provide an update on need / retail expenditure capacity issues, it has been agreed with the Council that the following will form part of this latest study:
- a targeted high level update to the quantitative need forecasts in the 2013 Study;
  - a targeted update to the previous qualitative assessment which focuses upon changes in provision since the 2010 and 2013 Studies and how recent trends in the retail sector are likely to affect the need for retail space across Stroud District.
- 4.3 For the purposes of this study, it has been agreed with the Council that a new survey of household shopping patterns would not be commissioned. Whilst the shopping patterns survey information in the 2010 and 2013 studies is now reasonably historic, collection of shopping patterns data at the present time can be problematic due to the on-going effects of the COVID-19 pandemic and, as a consequence, it may well be more appropriate to wait for shopping patterns (and town centre usage) to return to a more 'normal' settled state in the future.
- 4.4 When updating the quantitative retail expenditure figures, the following has been incorporated:
- The time-frame for the assessment has been set at 2021 (the current year) and ending at 2040 (the end date for the Local Plan Review). We retain the interim assessment years of 2026 and 2031 for ease of reference with the 2013 Study.
  - The latest population forecasts for each of the study area zones, provided by Experian.
  - The latest estimates of per capita convenience and comparison goods expenditure, provided by Experian. This is based on base 2019 spending data. For the purposes of this assessment we have changed the price base for retail spending to 2011 in order to provide a comparison with the results of the 2013 Study.



- We have adopted the latest future retail (per capita) expenditure forecasts for convenience and comparison goods up to 2040 (the end date for the Local Plan Review) published by Experian in October 2020<sup>5</sup>.
- As noted at the start of this report, a new survey of household shopping patterns has not been commissioned and therefore the market share data for convenience and comparison goods destinations remains the same as the 2013 study.
- The benchmark turnover for convenience goods floorspace has been updated to include the latest research from GlobalData for national grocery operators and new significant store openings and current (unimplemented) retail floorspace commitments have been incorporated. In relation to the latter point, the two additions are the recently opened ALDI foodstore in Stroud and the, soon to be opened, Lidl foodstore in Stroud.
- With regards to the benchmark turnover for comparison goods floorspace, we have adopted an approach which links benchmark turnover back to the assumptions made in the 2013, including: (A) using a pro-rata estimate from the 2013 data for 2018 and then (B) applying Experian's latest forecast floorspace efficiency rates over the remainder of the assessment period. This enables a link to be made with the evidence base prepared for the current development plan.

4.5 Table 4.1 below summarises the updated quantitative forecasts for convenience goods floorspace for 2021, 2026, 2031 and 2040. For ease of reference, Table 4.1 also provides the comparable forecasts for 2021, 2026 and 2031 from the 2013 study. The data below shows that, to varying extents, the level of capacity for net additional convenience goods floorspace across the five main settlements has reduced between the 2013 and 2021 assessments. The biggest difference lies in Stroud and this is due to the grant of planning permission for the new ALDI and Lidl stores. As a consequence, the reasonably modest levels of forecast capacity in 2013 have now been eliminated.

4.6 The other four main settlements have seen a more modest reduction in quantitative capacity. For Cam & Dursley and Stonehouse, very small levels of positive capacity have been turned into small levels of negative capacity, whilst the small levels of positive capacity in Wotton-under-Edge and Nailsworth have been reduced (at 2031 levels) by around one quarter to one fifth.

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<sup>5</sup> Retail Planner Briefing Note 18 (October 2020)

*Table 4.1: convenience goods floorspace quantitative forecasts – 2013 and 2021 studies (sq m net sales areas)*

| Settlement        |            | 2021  | 2026  | 2031  | 2040 |
|-------------------|------------|-------|-------|-------|------|
| Stroud            | 2013 Study | 725   | 1013  | 1386  | -    |
|                   | 2021 Study | -1560 | -1375 | -1165 | -683 |
| Cam & Dursley     | 2013 Study | 2     | 124   | 320   | -    |
|                   | 2021 Study | -600  | -544  | -482  | -314 |
| Nailsworth        | 2013 Study | 366   | 429   | 504   | -    |
|                   | 2021 Study | 316   | 363   | 419   | 531  |
| Wotton-under-Edge | 2013 Study | 338   | 371   | 408   | -    |
|                   | 2021 Study | 212   | 231   | 255   | 306  |
| Stonehouse        | 2013 Study | -37   | -10   | 26    | -    |
|                   | 2021 Study | -333  | -314  | -297  | -252 |

Notes: 2013 study forecasts taken from Appendix B of that document. Floorspace figures expressed in net sales areas for convenience goods floorspace only.

- 4.7 A similar exercise has been undertaken for comparison goods floorspace and this is summarised in Table 4.2 below.

*Table 4.2: comparison goods floorspace quantitative forecasts – 2013 and 2021 studies (sq m net sales areas)*

| Settlement        |            | 2021 | 2026 | 2031 | 2040 |
|-------------------|------------|------|------|------|------|
| Stroud            | 2013 Study | 943  | 2075 | 3634 | -    |
|                   | 2021 Study | 2465 | 2110 | 2412 | 3598 |
| Cam & Dursley     | 2013 Study | -99  | 78   | 322  | -    |
|                   | 2021 Study | -740 | -799 | -774 | -636 |
| Nailsworth        | 2013 Study | 119  | 275  | 482  | -    |
|                   | 2021 Study | 370  | 331  | 385  | 555  |
| Wotton-under-Edge | 2013 Study | 34   | 80   | 138  | -    |
|                   | 2021 Study | 70   | 58   | 71   | 115  |
| Stonehouse        | 2013 Study | 72   | 153  | 267  | -    |
|                   | 2021 Study | 221  | 196  | 214  | 296  |

Notes: 2013 study forecasts taken from Appendix B of that document. Floorspace figures expressed in net sales areas for comparison goods floorspace only.

- 4.8 The data in Table 4.2 above shows two notable things. First, for four out of the five settlements, the level of quantitative capacity for net additional floorspace is slightly higher at 2021 than previously forecast in the 2013 study. The exception to this is the 2021 forecast for Cam & Dursley. Second, whilst most of the forecasts show a slightly higher capacity at 2021, any growth beyond 2021 is slower, leading to lower levels of future capacity. As can be seen from the contents of Table 4.2 above, the levels of positive capacity, where they exist, are very modest and do not suggest a need, based upon quantitative factors, to plan for net additional comparison goods floorspace. The largest level of potential positive capacity is unsurprisingly in Stroud although there is no forecast growth in quantitative capacity over the next ten years and, in any event, there will be a wider set of factors to consider in terms of planning for comparison goods floorspace provision. These are discussed below.

4.9 In relation to qualitative issues and wider issues of 'need', there are a number of factors to note:

- The provision of two new foodstores in Stroud (ALDI and Lidl) will provide a qualitative improvement in relation to grocery store provision in the town. Whilst there was not a particularly significant qualitative deficiency in Stroud prior to these new stores, they will add to choice and competition for the local population. In relation to convenience goods provision in the other four main settlements, little has materially changed since the 2013 and 2017 studies and we consider that there is a good range of provision for the scale of each of the towns. As a consequence, there is nothing to suggest that the Council should be planning to allocate sites for net additional convenience goods floorspace (albeit, please see the comments below in relation to new local centres).
- As noted elsewhere in this report, over the past several years there has been a continued shift in trends affecting the retail sector and town centres in general. This has been noted by the 2017 study and a number of trends are affecting different land use sectors. The comparison goods sector on the high street has been particularly affected over the past several years (as noted by the 2017 study) and even leaving aside the recent/current effects of the COVID-19 pandemic, there is a general trend towards the shrinkage of some comparison goods retail uses in town centres, particularly national multiples in smaller-sized towns. Therefore, whilst the aspiration for the best possible range and choice of comparison goods shopping should not be set aside, realism in the current market would suggest that retaining existing occupiers should be a key priority along with ensuring that the regulatory (land use) environment in town centres is sufficiently flexible in order to allow local independent retailers to invest. Whilst it cannot necessarily be directly controlled by the planning system, it is very likely that the Districts town centres will focus more on local independent stores, due to the on-going competition from nearby larger centres such as Gloucester, Cheltenham, Cribbs Causeway and Bristol city centre.
- The on-going effects of the COVID-19 pandemic are all too apparent across many parts of day to day life in the UK and abroad. All parts of the UK retail and service sectors have been affected to one extent or another, the comparison goods retail and the food/beverage sectors most affected during 2020 and the early part of 2021. Whilst significant efforts are being made to bring the economy and day to day life back to normal, the current working assumption by many is that how people will use town centres in the future will change. An emerging trend has been for more frequent visits to small centres, whilst the steady rise of shopping via the internet has increased at a significant pace over the past year (with forecasters suggesting that it is unlikely to return to pre-COVID levels).

- Whilst the general recommendations for convenience and comparison goods retail floorspace across the five main town centres suggest that there is no particular requirement to plan to net additional provision in and around the main town centres, a further matter to consider is the need for smaller scale localised provision. This is primarily directed towards new local and neighbourhood centres in significant urban extensions and new settlements. Provision of retail and service floorspace in such circumstances is, in our opinion, entirely appropriate and should be of a scale which is proportionate to the role and function of the location in question, and can comprise a legitimate localised need.

4.10 Overall, the updated quantitative capacity forecasts continue to show limited levels of positive capacity across the five main settlements in the District, with a notable reduction in Stroud for convenience goods due to two new foodstores. These new stores will provide a qualitative improvement and add to choice and competition. However, bearing in mind also the other factors and trends outlined in this report, it would appear that there would not be an overriding need to plan for new retail floorspace across the five main settlements, as the focus should be on supporting existing provision in defined town centres. In our opinion, the main 'needs' in this instance for Stroud District are to support the health of the main town centres and allow them to respond to the changing face of retailing and commercial town centre land uses, along with changes being made to the regulatory system governing land uses in town centres.

## 5. Policy Advice / Recommendations

5.1 In order to contribute to the on-going preparation of the Local Plan Review, the Council has requested that this study provides a review of existing retail and town centre planning policies in the adopted Local Plan, which is undertaken in the context of changes to national planning policy / legislation and the on-going trends affecting 'town centres'.

5.2 Within the adopted Local Plan the main strategic policy dealing with retailing and town centres is Policy CP12. This policy sets out the 'town centre' hierarchy across the District, along with the approach to maintaining and enhancing the health of existing 'town centres' and the provision of new local centres. CP12 also outlines the general approach to the assessment of development proposals within town centres and also the assessment of retail land use proposals located outside of defined centres. CP12 is supported by the following more detailed development management policies:

- Policy EI6: protecting individual and village shops
- Policy EI7: non-retail uses in primary frontages
- Policy EI8: non-retail uses in secondary frontages
- Policy EI9: floorspace thresholds for impact assessments

5.3 The above policies are supported by a policies map which includes the following definitions:

- Principal town centre boundaries
- Other town centre boundaries
- District and local centre boundaries
- Primary shopping frontages
- Secondary shopping frontages (Stroud town centre only)

5.4 We provide advice on these various aspects of planning policy in turn below.

### *Retail / Town Centre Hierarchy and Overall Strategy*

5.5 With regards to the overall 'town centre' hierarchy in the District, CP12 outlines four different tiers of centre: town, district, local and neighbourhood. In addition, the top town centre tier is split into two, with Stroud as the 'Principal Town Centre' and Dursley, Nailsworth, Stonehouse and Wotton-under-

Edge as the 'Other Town Centres'. Within the adopted version of CP12, the identified local centres are a mixture of existing locations (i.e. Cainscross) and planned new centres such as Hunts Grove and land to the west of Stonehouse.

- 5.6 With regards to the adopted hierarchy in CP12, we consider that it remains 'fit for purpose' in relation to the general role of the main existing town centres across the District. We consider that it is correct for Stroud town centre to be identified separately to the other four town centres bearing in mind the amount of retail, leisure, service and commercial units / floorspace in the centre when compared with the other four centres.
- 5.7 In relation to the separate identification of local and neighbourhood centres, we consider that this is an entirely reasonable response to the specific characteristics of the District and the role and function of particular settlements (and their constituent main town centre uses). We do not consider that these classifications need to change although it should be noted that based upon the definition of 'town centres' in the current version of the NPPF then 'neighbourhood centres' are to be excluded as a material consideration for impact assessments. Therefore, should the Council decide that the health of identified neighbourhood centres requires protection, for the benefit of the local communities that they serve, then this should be made clear in any update to CP12 and any related retail/leisure impact assessment policies in the Local Plan Review<sup>6</sup>.
- 5.8 Moving on to the remaining parts of Policy CP12, we would make the following recommendations:
- there is no requirement to alter the content of part (b) which supports maintaining and enhancing the health of all defined 'town centres' in the District.
  - the general approach to the provision of new 'local centres' in urban extension sites remains appropriate and valid. We strongly support the need for these new centres to be appropriate in terms of their scale and function and we would recommend that, for the avoidance of doubt, and in order to provide a robust expanded town centre hierarchy going forwards, that the Council makes it a specific development management requirement for future planning applications to be supported by information on these issues. The same approach should also be applied to new centres within planned new settlements in the District.
  - with regards to part (d) of CP12, we recommend that the sequence of preferred locations should start with defined Primary Shopping Areas (where they are defined<sup>7</sup>), followed by edge-of-centre

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<sup>6</sup> for the avoidance of doubt we would recommend that any decision to include neighbourhood centres as part of material considerations for impact assessment should be supported by clarification that, for impact testing purposes, they are to be treated as lower-order local centres in NPPF-terms.

<sup>7</sup> unless it is decided that the PSA and 'town centre' boundaries are the same.

and then out-of-centre sites. It should also be clarified that the assessment of edge-of-centre and/or out-of-centre locations should give preference to those which are accessible and well connected to town centres.

- The supporting text at paragraph 5.20 to CP12 outlines a series of several criteria which should be assessed in relation to the vitality and viability of town centres. Whilst it is not clear from the current wording, we have assumed that these criteria relate to proposals within defined 'town centres' and, if so, this would be clarified.
- Finally, we do not consider that any material changes to part (e) of CP12 are required although it should be noted that any retail and leisure land use proposals outside of defined 'town centres' may also be supported where they meet the requirements of the development plan and NPPF impact tests.

#### *Town Centre Development Management Policies and Designations*

- 5.9 One of the most significant changes in national planning policy in recent years has been for the NPPF to remove the formal requirement for local authorities to designate primary and secondary retail frontages. This change is likely, in our opinion, to reflect the on-going changes and pressures facing town centres. It is also likely to be a recognition that the traditional wisdom that retail uses are the dominant sector in town centres is now no longer the case. It should be noted, however, that whilst the formal requirement has been dropped, the updated latest version of the NPPG still allows for the definition of these two frontages where the circumstances justify.
- 5.10 Despite the change in relation to the definition of 'frontages', it should also be noted that the current version of the NPPF (paragraph 85(b)) continues to require development plan policies to define town centre boundaries and primary shopping area boundaries and provide development management policies for the assessment of proposals within these areas.
- 5.11 Therefore, for the purposes of the Local Plan Review, consideration will need to be given to two issues: (A) the need for the Local Plan Review policies map to include town centre and primary shopping area boundaries; and (B) whether primary and secondary retail frontages are still required for the purposes of the Local Plan Review.
- 5.12 When considering the need to continue with existing primary and secondary frontages, it will be important to take into account the on-going changes affecting retailing and town centres and what this may mean for the future health of town centres. In addition, it will also be important to take into

account the changes to the Use Classes Order and how this will affect development management issues.

- 5.13 In our view, the need to continue with defined primary and secondary retail/shopping frontages in most town centres has been significantly reduced over recent years. Retail uses (i.e. former Class A1 retail uses, now Class E(a) uses) remain an important part of the health and attractiveness of any town centre although the competition posed by out of centre retailing, shopping via the internet, and the decision of some retail businesses to pull out of small to mid-sized town centres, mean that other land uses will be required to maintain and enhance town centre health and support vitality. In recent years many local authorities have moved away from quantitative development management thresholds, which are found within policies such as E17 of the adopted Local Plan, to a more qualitative based approach which allows for a wider set of land uses (so long as they make a positive contribution to the health and attractiveness of a centre). This will be further influenced by the changes to the Use Classes Order (see below).
- 5.14 Therefore, it is our opinion that there is no longer a specific requirement for primary and secondary retail/shopping frontages to be included in the Local Plan Review. Commercial market conditions and national planning policy have moved on to such an extent that a wider range of land uses will now make an equal or greater contribution to Stroud District's town centres going forwards. Clearly, it will remain important for the Local Plan Review to include robust development management policies to maintain and enhance the health of defined town centres and we consider that this can be achieved via policies associated with defined town centre and primary shopping area boundaries.
- 5.15 Therefore, consideration has been given to what these boundaries should be, including whether separate boundaries should be defined in specific centres:
- Stroud: no change is required in relation to the town centre boundary in the adopted Local Plan, whilst the primary and secondary frontages should be combined and re-designated as the 'primary shopping area'.
  - Dursley, Nailsworth, Stonehouse and Wotton-under-Edge: the existing Local Plan town centre boundary should remain as per the existing policies map and the primary frontages re-designated as the 'primary shopping area'.
- 5.16 Alongside the recommended changes to town centre boundaries and frontages, there will be a need for development management policy in relation to these defined areas to be updated, for two particular reasons: (A) due to the change in general approach from frontages to primary shopping areas and town



centre boundaries; and (B) due to the impact of changes in the Use Classes Order and permitted development rights.

5.17 Based upon the definition of primary shopping areas in the NPPF, this remains the area where retail development is concentrated – i.e. the boundary definition is reflective of the situation ‘on the ground’. Previously, this would have translated itself into a policy which promoted, as a first preference, former Class A1 retail uses (now Class E(a) uses), and proposals requiring planning permission involving the loss of A1 uses would have been carefully scrutinised.

5.18 However, it may now be the case that, in line with the general direction of travel for a wider set of land uses in town centres, along with the changes to the Use Classes Order, a clear preference for (and the protection of) retail uses (i.e. former Class A1 / Class E(a)) cannot now be sustained in town centres when a local authority is faced with a planning application for new development.

5.19 Based upon the current situation, at the time of preparing this report, the following arrangements are in place:

- planning applications for Class E uses submitted after 1<sup>st</sup> September 2020, and gaining planning permission, will be subject to the permitted development rights established under the new regime.
- uses which were applied for prior to 1<sup>st</sup> September 2020 will retain the effect of the permitted development rights based on the classes that were in place prior to this date, during a prescribed transitional period up to 31<sup>st</sup> July 2021 (when new revised permitted rights will be introduced).
- there is also the option for a local authority to consider imposing Article 4 Directions although the NPPG notes that they “should be limited to situations where this is necessary to protect local amenity or the wellbeing of the area. The potential harm that the direction is intended to address will need to be clearly identified, and there will need to be a particularly strong justification for the withdrawal of permitted development right”. This includes areas where ‘prior approval’ powers are available to control permitted development (which includes certain current main town centre land use related permitted development rights under the pre-1<sup>st</sup> September 2020 regime).

5.20 Therefore, it would appear that the on-going preparation of the Local Plan Review will need to consider the following:

- town centre development management policies in the Local Plan Review will be focused upon proposals for new physical development or changes of use which require planning permission.

- bearing in mind the changes to the Use Classes Order, the focus for primary shopping area and town centre policies will need to switch, in part, to the content of Use Class E. Based upon the recent changes to the Use Classes Order, a continued focus on just retail uses (i.e. former A1 / E(a)) may now not be justified in town centres and the focus in certain defined areas will be on Use Class E.
- As noted above, the change in the definition of boundaries in the District's main town centres will mean that, bearing in mind the above:
  - there will be a presumption in favour of Class E uses in primary shopping areas<sup>8</sup>;
  - other main town centre land uses may also be appropriate in primary shopping areas but approval of such uses will be subject to clear and robust development management criteria (an example of this being former A4 and A5 drinking and take-away uses which can attract visitors to town centres but can give rise to important local implications); and
  - in line with the current approach proposals within town centre boundaries but outside of the 'primary shopping areas' will be faced with a more relaxed regime, with a wider set of main town centre uses encouraged (subject to appropriate and proportionate development management criteria).

5.21 In relation to development management policy criteria, we recommend that a qualitative approach is adopted and the existing criteria outlined in paragraph 5.20 of the adopted Local Plan would appear to be a sensible basis for such an assessment. The criteria would, of course, need to be refined to deal with current circumstances, including:

- A slight change in emphasis in order that the criteria move away from former A1 retail uses (now Class E(a)) and re-focus on Class E uses.
- The need to provide general development policies for preferred Class E uses in 'primary shopping areas', alongside an expanded range of criteria for the assessment of non-Class E use proposals in 'primary shopping areas'.
- In those centres where there are differing primary shopping area and town centre boundaries, a more relaxed and flexible approach to proposals in the wider town centre boundary which focuses upon a wider set of main town centre uses.

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<sup>8</sup> although the terms Class E and 'primary shopping area' can on, face value, seem to conflict to a certain extent, and therefore an explanation in the supporting text in the Local Plan Review will be required.

5.22 We would suggest that the above recommendations also apply to the content of the 2019 Draft Local Plan.

*Development Management Policies for Proposals Outside Defined Town Centres*

5.23 In a similar manner to the need to consider refinements to town centre development management policies, there is a need to consider whether the two development management policies which deal with retail and main town centre land use proposals located outside of town centres (CP12 and EI9) are in need of refinement in light of changes in national policy and legislation.

5.24 There are a number of aspects to consider:

- First, adopted and draft Local Plan policies continue to deal with the correct national planning policy tests for certain main town centre uses proposed outside of town centres.
- Second, whether the approach / criteria for the application of each test remains consistent with national policy.
- Third, how the recent changes to the Use Classes Order may influence the drafting of policies and the Council's approach to their application.

5.25 With regards to the general policy approach, CP12 deals with the application of the sequential test for main town centre uses and EI9 deals with the Council's approach to the assessment of impact of retail proposals located outside of town centres. In principle, this framework remains consistent with the latest version of planning policy, although we would recommend that an updated version of Policy EI9 is provided which ensures complete conformity with paragraph 89 of the NPPF. We recommend that the impact test should also be applied to leisure proposals (in addition to the existing requirement for retail proposal) which are located outside of town centres and not in accordance with an up-to-date plan. The scale of proposal which this should apply to is discussed below.

5.26 In relation to which 'leisure' uses this should apply to, the NPPF is unfortunately not specific as page 68 of the Glossary in Annex 2 of the latest version combines examples of leisure, entertainment and more intensive sport and recreation uses into one single grouping. However, we consider that food and beverage uses, such as cafes, restaurants, drive through restaurants, bars and pubs should fall into the leisure category.

5.27 In relation to the local application of the sequential test, this is currently contained within adopted Policy CP12 and specifically parts (d) and (e). The same structure is currently proposed to be retained in the draft version of CP12. These elements of policy outline the sequence of preferred locations which

is consistent with national policy, alongside some locally-specific criteria (including the suggestion that certain types of bulky goods retail development could be supported so long as it complies with the sequential test). With regards to the general approach to the sequential test, we would recommend two small refinements in the new version of CP12:

- First, it should be clarified that the sequential test will apply to all main town centre land use proposals located outside of the defined primary shopping areas<sup>9</sup> and not in accordance with the provisions of the Local Plan Review.
- Second, it will be important to clarify the approach to assessing edge and/or out of centre locations within the sequential test. The NPPF makes it clear that *“preference should be given to accessible sites which are well connected to the town centre”*. In other words, when the Council is considering various edge or out of centre locations in relation to a particular proposal, consideration will need to be given to whether a preference can be afforded to one location over another.

5.28 With regards to the impact test, save for the need to include reference to leisure proposals located outside of defined centres and not in accordance with an up to date plan, we do not consider that there is a need for any further refinements to Policy EI9 (which is currently proposed to be unchanged in the Local Plan Review). We agree that there is a strong case for the Council to set an impact assessment threshold which is materially lower than the national default threshold of 2,500sq m gross and the varying levels of floorspace thresholds in EI9 are reasonably reflective of the scale, role and function of each of the key settlements in the District.

5.29 Finally, there is a need to consider whether the recent changes to the Use Classes Order will affect the content of the sequential and impact test policies in the Local Plan Review and/or their application. Whilst it would be helpful for future versions of the NPPF to provide better consistency between development management policy and the Use Classes Order, it may also be useful for the Local Plan Review to be clear as to which use classes are affected by the sequential and impact test requirements.

5.30 With regards to the application of the sequential and impact test policies, the approach which was being adopted prior to the changes in September 2020 was reasonably straight-forward, as it related to: (A) the former, more specific, use classes; (B) the nature, type and scale of the proposal; (C) the proposed function of the proposal; and (D) influenced by any restrictive conditions/controls which the promoter of the scheme was willing to adhere to.

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<sup>9</sup> where they differ from defined town centre boundaries

5.31 We do not consider that this general approach requires any fundamental change, although the greater flexibility in relation to the new Use Class E will require applicants and the Council to consider how they now approach both policy tests. Prior to the changes in September 2020, the application of the policy tests would have been specific to the land uses at that time – i.e. A1 retail; A3/4/5 food and beverage; D2 leisure. Whilst some main town centres retain a specific classification, or are sui generis, the new Use Class E encompasses a wide range of main town centre uses, including retail, some food and beverage, office and some leisure uses. As a consequence, applying for Use Class E in a post-September 2020 planning application could give rise to a number of possibilities and therefore:

- Whilst it may not be appropriate to restrict new development proposals in town centres to a sub-category in Class E, there are likely to be a greater amount of potential sensitivities for such proposals outside of town centres – bearing in mind the current town centre first approach and the objective of maintaining and enhancing town centre health.
- Applying for new floorspace within Class E, particularly in relation to outline planning applications, gives rise to a number of permutations. As a consequence, the Council should work with applicants to understand the degree of flexibility sought. If maximum flexibility is sought then a range of alternative scenarios within the sequential and impact tests will be required. However, if an applicant is focused upon a use within a particular sub-category of Class E then this could be agreed at the pre-application stage and an agreement reached regarding restricted conditions on any planning permission granted by the Council.

5.32 Therefore, in light of the above, it can be concluded that whilst the general approach to the application of the sequential and impact policy tests may not change, there is increased merit in the Council and applicant's agreeing the specific suite of land uses for edge or out of centre proposals in order that assessments are robust and can be related to any decision made by the Council. It is noted that, at paragraph 5.55 of the adopted Local Plan, encouragement is given to agreeing the scope of impact assessments and we would: (A) reinforce this approach; (B) recommend that it deals with the Class E land use issues outlined above; and (C) be extended to cover both the sequential and impact planning policy tests.

#### *Approach to the Identification of New Local Centres*

5.33 The final area of advice in relation to planning policy is in relation to the establishment of new centres to serve new settlement and urban extension sites. Such an approach is common in development plan strategy documents and it is to be noted that: (A) the adopted Local Plan includes provision for two new local centres; and (B) the draft 2019 Local Plan proposes to add additional new local centres.

5.34 Part C of the adopted version of Policy CP12 and the proposed new version of CP12 in the draft 2019 Local Plan both deal with the establishment of these new local centres and explain that they should be of a scale appropriate to the site and not undermine the role of other centres. In our view, there is no reason to divert from this approach as it remains appropriate in terms of providing easily accessible and convenient day to day retail and service uses within substantial new residential-led developments.

5.35 Given that the content of CP12 will effectively define these new centres as formal 'town centres' in the development plan hierarchy, it will be important for the Local Plan Review to be clear what is allowable in principle and what further information may be required. Part (c) of CP12 makes an important and substantial start to this process, although we would recommend that the following aspects are considered:

- Whether specific additional guidance is required as part of the allocation of new sustainable urban extensions, including: (A) greater detail on the expected content of the planned new centre; and (B) the potential for the plan-making process to provide a further level of information and analysis to assist with the determination of any subsequent planning applications.
- If the above is considered not to be appropriate, then the supporting text to the updated version of CP12 to deal in greater detail with what level of information and analysis will be required at the planning application stage, including:
  - an analysis of the proposed main town centre uses in relation to their scale and format
  - the likely catchment of the proposed new centre
  - an analysis of the accessibility to existing stores and centres in the wider area
  - the spending power of the new development that the new centre seeks to serve
  - an assessment of financial impact
  - an assessment of the likely scale of trading overlap with existing centres in the surrounding area

## 6. Summary and Conclusions

6.1 This report has been prepared by Avison Young for Stroud District Council in relation to retail and town centre planning policy issues in order to inform the Stroud District Local Plan Review. The Council is in the process of consulting on the content of the Local Plan Review and has identified the need for updated advice and analysis in relation to the following areas:

- an update in relation to national planning policy and legislation insofar as retail and town centre land uses are concerned.
- re-visiting the previous assessments of need for retail floorspace across Stroud District.
- a summary of recent / current trends in the retail sector.
- advice on the content of retail and town centre planning policies in the Local Plan Review.

6.2 This report is aimed at providing a targeted update to three previous retail and town centre studies prepared for the Council prepared in 2010, 2013 and 2017: the Stroud District Town Centres and Retailing Study (2010); the Stroud Retail Study Update 2013 and The Future of Town Centres (2017). These studies provided a comprehensive review of town centre health, retail floorspace need, potential development site assessments and planning policy advice. Due to the time which has elapsed since the 2013 and 2017 studies, the Council has asked AY to prepare this report to support the Local Plan Review, concentrating upon the material changes which have occurred since the previous studies.

6.3 Given that the preparation of this study has been undertaken during the COVID-19 pandemic, AY and the Council have agreed to focus on a number of specific areas which can make a meaningful contribution to the Local Plan Review. Whilst the collection of data relating to land uses in the District's several town centres would, in normal circumstances, make an important contribution to a retail-related evidence base research document, current 'lockdown' measures mean that land use surveys may not be able to accurately ascertain a true picture of town centre health. This aspect will need to be kept under review by the Council, with consideration given to whether future land use surveys are required for the purposes of informing the Local Plan Review.

6.4 This report has outlined the on-going changes in the various parts of the retail sector and how they have been affecting town centres. This has included the pressures facing the comparison goods sector, including corporate business failures, the decision by some retailers to close stores in smaller centres and the on-going and increasing influence of retail sales via the internet. Moreover, this report summarises the on-going effects of the current COVID-19 pandemic on the retail sector and the high street and how the lasting effects of the pandemic may affect the future direction for town centres.

This includes an analysis of how retail expenditure forecasts have changed since the 2013 Study, along with the growing influence of retail expenditure via the internet.

- 6.5 With regards to the assessment of the need for retail floorspace, this study has provided a high level re-assessment of quantitative capacity and has found a reduction in overall floorspace capacity levels. This is due to a number of factors, including new foodstore provision in Stroud and a general lowering of economic forecasts. The overall general assessment of need is that it remains the case that there is no overriding case in general terms for development plan allocations in each of the main settlements in the District although there is a case for the provision of local retail and service facilities within any significant sustainable urban extensions and/or new settlements in the District.
- 6.6 Alongside these trends and recommendations, recent changes to national planning policy and legislation since the previous 2013 and 2017 studies have also been summarised, and an analysis provided to explain how these changes could affect and influence the formulation of local policies and strategy in the Local Plan Review. This has resulted in advice on potential refinements to existing Local Plan policies to take into account these trends and policy/legislative changes. This includes: (A) changes to the definition of boundaries and frontages in the main town centres; (B) refinements to town centre development management policies to take into account the recent changes to the Use Classes Order; and (C) the need for refinements in the approach to development management.



# Appendix I

## 2020 Changes to the Use Classes Order

## Summary of changes to the Class Order Schedule

| <i>Uses (description)</i>   | <i>Uses (current Class)</i>                     | <i>Use new class (From 1 September 2020)</i>      |
|---|---|---|
| <i>Shops</i>  |   | <i>Class E: Commercial Business and Service</i>   |
| <i>Retail warehouse</i>   |   |   |
| <i>Hairdressers</i>   |   |   |
| <i>Undertakers</i>  |   |   |
| <i>Travel and Ticket Agencies</i>   |   |   |
| <i>Post Offices</i>   |   |   |
| <i>Pet Shops</i>  | <i>A1 (shops)</i>                               |   |
| <i>Sandwich Bars</i>  |   |   |
| <i>Showrooms</i>  |   |   |
| <i>Domestic Hire Shops</i>  |   |   |
| <i>Dry Cleaners</i>   |   |   |
| <i>Funeral Directors</i>  |   |   |
| <i>Internet Cafes</i>   |   |   |
| <i>Financial services such as banks and building societies</i>  |   | <i>Class E: Commercial Business and Service</i>   |
| <i>Professional services such as estate and employment agencies (excluding health and medical services)</i> | <i>A2 (Professional and Financial Services)</i> |   |
| <i>Sale of food and drink for consumption on site</i>   |   |   |
| <i>Restaurants</i>  |   | <i>Class E: Commercial Business and Service</i>   |
| <i>Cafes</i>  | <i>A3 (Restaurants and Cafes)</i>               |   |
| <i>Snack Bars</i>   |   |   |
| <i>Pub or drinking establishment</i>  | <i>A4 (Drinking Establishments)</i>             | <i>Sui Generis</i>                                |
| <i>Takeaway</i>   | <i>A5 (Hot Food Takeaways)</i>                  | <i>Sui Generis</i>                                |
| <i>Offices</i>  |   | <i>Class E: Commercial Business and Service</i>   |
| <i>Research and development of products and processes</i>   | <i>B1 (Business)</i>                            |   |
| <i>Light industry appropriate in a residential area</i>   |   |   |
| <i>Clinics</i>  |   | <i>Class E: Commercial Business and Service</i>   |
| <i>Health Centres</i>   |   |   |
| <i>Creches</i>  | <i>D1: Non-residential institutions</i>         |   |
| <i>Day Nurseries</i>  |   |   |
| <i>Day Centres</i>  |   |   |
| <i>Schools</i>  |   | <i>F1: Learning and Non-Learning Institutions</i> |
| <i>Art Galleries (other than for sale or hire)</i>  |   |   |
| <i>Museums</i>  |   |   |
| <i>Libraries</i>  | <i>D1: Non-residential institutions</i>         |   |
| <i>Halls</i>  |   |   |
| <i>Places of Worship</i>  |   |   |
| <i>Church Halls</i>   |   |   |
| <i>Law Court</i>  |   |   |

| <i>Uses (description)</i>  | <i>Uses (current Class)</i>     | <i>Use new class (From 1 September 2020)</i>    |
|--|---------------------------------|---|
| <i>Cinemas</i>   |                                 |   |
| <i>Music and Concert Halls</i>   |                                 |   |
| <i>Bingo Halls</i>   | <i>D2: Assembly and Leisure</i> | <i>Sui Generis</i>                              |
| <i>Dance Halls (not nightclubs)</i>  |                                 |   |
| <i>Gymnasiums</i>  |                                 |   |
| <i>Indoor sports and recreation (except for motorsports, or where firearms are used)</i>                                       | <i>D2: Assembly and Leisure</i> | <i>Class E: Commercial Business and Service</i> |
| <i>Hall or meeting place for the principle use of the local community</i>  |                                 |   |
| <i>Swimming Pools (indoor or outdoor)</i>  |                                 |   |
| <i>Skating Rinks</i>   | <i>D2: Assembly and Leisure</i> |   |
| <i>Outdoor sports and recreation (except for motorsports, or where firearms are used)</i>                                      |                                 | <i>F2: Local Community Uses</i>                 |
| <i>Shops (not more than 280sqm mostly selling essential goods, including food and at least 1 km from another similar shop)</i> | <i>A1 (shops)</i>               |   |

#### *Use Classes Orders with No Change*

|  |   |   |
|--|---|---|
| <i>Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).</i>               | <i>B2 (General Industrial)</i>                  | <i>B2 (General Industrial)</i>                  |
| <i>Storage and Distribution Centres (inc. open air storage)</i>  | <i>B8 (Storage and Distribution)</i>            | <i>B8 (Storage and Distribution)</i>            |
| <i>Hotels, boarding and guest houses (where no significant element of care is provided)</i>  | <i>C1 (Hotels)</i>                              | <i>C1 (Hotels)</i>                              |
| <i>Residential accommodation and care to people in need of care, residential schools, colleges or training centres, hospitals, nursing homes</i>                             | <i>C2 (Residential Institutions)</i>            | <i>C2 (Residential Institutions)</i>            |
| <i>Single person, or family houses.</i>  | <i>C3 (Dwelling houses)</i>                     | <i>C3 (Dwelling houses)</i>                     |
| <i>Small shared houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom</i> | <i>C4 (Small Houses in Multiple Occupation)</i> | <i>C4 (Small Houses in Multiple Occupation)</i> |

# Appendix II

## Updated Quantitative Forecasts

**TABLE 1: POPULATION WITHIN STUDY AREA, BY ZONE**

|      | ZONE   |        |       |       |       |       |        |       |        |       |        |        |
|------|--------|--------|-------|-------|-------|-------|--------|-------|--------|-------|--------|--------|
|      | 1      | 2      | 3     | 4A    | 4B    | 5     | 6      | 7     | 8      | 9     | 10     | 11     |
| 2021 | 32,944 | 15891  | 8470  | 6681  | 3774  | 6645  | 17117  | 6765  | 12955  | 6245  | 65088  | 19647  |
| 2026 | 34,040 | 16434  | 8700  | 6960  | 3821  | 6896  | 18302  | 6963  | 13568  | 6457  | 67623  | 20164  |
| 2031 | 35,091 | 16845  | 8881  | 7165  | 3828  | 7175  | 19338  | 7149  | 14218  | 6635  | 69855  | 20569  |
| 2040 | 36,776 | 17,546 | 9,093 | 7,632 | 3,834 | 7,584 | 20,719 | 7,408 | 15,390 | 6,893 | 73,530 | 21,321 |

**Notes:**

Population data provided by Experian.

**TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE, BY ZONE**

|      | ZONE   |        |        |        |        |        |        |        |        |        |        |        |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
|      | 1      | 2      | 3      | 4A     | 4B     | 5      | 6      | 7      | 8      | 9      | 10     | 11     |
| 2021 | £2,015 | £1,993 | £2,501 | £2,083 | £2,211 | £2,073 | £2,227 | £2,046 | £2,079 | £2,075 | £1,970 | £1,999 |
| 2026 | £2,003 | £1,981 | £2,486 | £2,071 | £2,198 | £2,060 | £2,214 | £2,034 | £2,066 | £2,063 | £1,958 | £1,987 |
| 2031 | £1,989 | £1,967 | £2,469 | £2,056 | £2,182 | £2,046 | £2,198 | £2,020 | £2,052 | £2,049 | £1,944 | £1,974 |
| 2040 | £1,995 | £1,973 | £2,476 | £2,062 | £2,189 | £2,052 | £2,205 | £2,026 | £2,058 | £2,055 | £1,950 | £1,979 |

**Notes:**

Base per capita retail expenditure data provided by Experian.

Per capita expenditure rates projected forward over the study period using forecasts within Experian's Retail Planner Briefing Note 18.

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

|      | ZONE   |        |        |        |        |        |        |        |        |        |        |        |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
|      | 1      | 2      | 3      | 4A     | 4B     | 5      | 6      | 7      | 8      | 9      | 10     | 11     |
| 2021 | £692   | £671   | £886   | £741   | £745   | £704   | £746   | £668   | £702   | £639   | £684   | £658   |
| 2026 | £775   | £751   | £993   | £830   | £834   | £789   | £836   | £749   | £786   | £716   | £766   | £737   |
| 2031 | £871   | £844   | £1,116 | £933   | £937   | £886   | £939   | £841   | £883   | £805   | £861   | £829   |
| 2040 | £1,102 | £1,069 | £1,413 | £1,181 | £1,187 | £1,122 | £1,189 | £1,065 | £1,118 | £1,019 | £1,090 | £1,049 |

**Notes:**

Base per capita retail expenditure data provided by Experian.

Per capita expenditure rates projected forward over the study period using forecasts within Experian's Retail Planner Briefing Note 18.

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

|      | ZONE   |        |        |        |        |        |        |        |        |        |        |        |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
|      | 1      | 2      | 3      | 4A     | 4B     | 5      | 6      | 7      | 8      | 9      | 10     | 11     |
| 2021 | £1,566 | £1,567 | £2,193 | £1,777 | £1,905 | £1,718 | £1,873 | £1,686 | £1,809 | £1,643 | £1,563 | £1,565 |
| 2026 | £1,755 | £1,756 | £2,457 | £1,991 | £2,134 | £1,925 | £2,099 | £1,888 | £2,027 | £1,841 | £1,751 | £1,753 |
| 2031 | £1,972 | £1,973 | £2,761 | £2,238 | £2,398 | £2,163 | £2,358 | £2,122 | £2,278 | £2,068 | £1,968 | £1,970 |
| 2040 | £2,496 | £2,498 | £3,495 | £2,833 | £3,036 | £2,738 | £2,986 | £2,687 | £2,884 | £2,618 | £2,491 | £2,494 |

**Notes:**

Base per capita retail expenditure data provided by Experian.

Per capita expenditure rates projected forward over the study period using forecasts within Experian's Retail Planner Briefing Note 18.



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

|      | ZONE |      |      |      |      |      |      |      |      |      |      |      |
|------|------|------|------|------|------|------|------|------|------|------|------|------|
|      | 1    | 2    | 3    | 4A   | 4B   | 5    | 6    | 7    | 8    | 9    | 10   | 11   |
| 2021 | £199 | £191 | £300 | £210 | £232 | £203 | £238 | £213 | £225 | £194 | £211 | £190 |
| 2026 | £223 | £214 | £336 | £235 | £260 | £227 | £267 | £239 | £252 | £217 | £237 | £212 |
| 2031 | £251 | £240 | £378 | £264 | £292 | £255 | £300 | £268 | £283 | £244 | £266 | £239 |
| 2040 | £318 | £304 | £478 | £335 | £370 | £323 | £379 | £340 | £358 | £308 | £337 | £302 |

**Notes:**

Base per capita retail expenditure data provided by Experian.

Per capita expenditure rates projected forward over the study period using forecasts within Experian's Retail Planner Briefing Note 18.

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

|      | ZONE |      |      |      |      |      |      |      |      |      |      |      |
|------|------|------|------|------|------|------|------|------|------|------|------|------|
|      | 1    | 2    | 3    | 4A   | 4B   | 5    | 6    | 7    | 8    | 9    | 10   | 11   |
| 2021 | £418 | £418 | £526 | £422 | £495 | £452 | £454 | £410 | £428 | £411 | £379 | £374 |
| 2026 | £468 | £468 | £589 | £473 | £554 | £507 | £509 | £460 | £480 | £460 | £425 | £419 |
| 2031 | £526 | £526 | £662 | £532 | £623 | £569 | £572 | £516 | £539 | £517 | £478 | £471 |
| 2040 | £666 | £666 | £839 | £673 | £788 | £721 | £724 | £654 | £682 | £655 | £605 | £597 |

**Notes:**

Base per capita retail expenditure data provided by Experian.

Per capita expenditure rates projected forward over the study period using forecasts within Experian's Retail Planner Briefing Note 18.

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

|      | ZONE |      |      |      |      |      |      |      |      |      |      |      |
|------|------|------|------|------|------|------|------|------|------|------|------|------|
|      | 1    | 2    | 3    | 4A   | 4B   | 5    | 6    | 7    | 8    | 9    | 10   | 11   |
| 2021 | £220 | £227 | £375 | £255 | £296 | £248 | £307 | £261 | £289 | £253 | £210 | £230 |
| 2026 | £246 | £254 | £421 | £286 | £332 | £278 | £344 | £293 | £324 | £284 | £235 | £257 |
| 2031 | £277 | £286 | £473 | £321 | £373 | £312 | £386 | £329 | £364 | £319 | £265 | £289 |
| 2040 | £350 | £361 | £598 | £407 | £472 | £395 | £489 | £416 | £461 | £404 | £335 | £366 |

**Notes:**

Base per capita retail expenditure data provided by Experian.

Per capita expenditure rates projected forward over the study period using forecasts within Experian's Retail Planner Briefing Note 18.

**TABLE 4: TOTAL CONVENIENCE GOODS EXPENDITURE, BY ZONE**

|      | ZONE  |       |       |       |      |       |       |       |       |       |        | Total |               |
|------|-------|-------|-------|-------|------|-------|-------|-------|-------|-------|--------|-------|---------------|
|      | 1     | 2     | 3     | 4A    | 4B   | 5     | 6     | 7     | 8     | 9     | 10     |       | 11            |
| 2021 | £66.4 | £31.7 | £21.2 | £13.9 | £8.3 | £13.8 | £38.1 | £13.8 | £26.9 | £13.0 | £128.2 | £39.3 | <b>£414.6</b> |
| 2026 | £68.2 | £32.5 | £21.6 | £14.4 | £8.4 | £14.2 | £40.5 | £14.2 | £28.0 | £13.3 | £132.4 | £40.1 | <b>£427.9</b> |
| 2031 | £69.8 | £33.1 | £21.9 | £14.7 | £8.4 | £14.7 | £42.5 | £14.4 | £29.2 | £13.6 | £135.8 | £40.6 | <b>£438.7</b> |
| 2040 | £73.4 | £34.6 | £22.5 | £15.7 | £8.4 | £15.6 | £45.7 | £15.0 | £31.7 | £14.2 | £143.4 | £42.2 | <b>£462.3</b> |

**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            |
| 2021 | £22.8 | £10.7 | £7.5  | £5.0 | £2.8 | £4.7 | £12.8 | £4.5 | £9.1  | £4.0 | £44.5 | £12.9 | <b>£141.2</b> |
| 2026 | £26.4 | £12.3 | £8.6  | £5.8 | £3.2 | £5.4 | £15.3 | £5.2 | £10.7 | £4.6 | £51.8 | £14.9 | <b>£164.2</b> |
| 2031 | £30.6 | £14.2 | £9.9  | £6.7 | £3.6 | £6.4 | £18.2 | £6.0 | £12.6 | £5.3 | £60.1 | £17.0 | <b>£190.6</b> |
| 2040 | £40.5 | £18.8 | £12.8 | £9.0 | £4.6 | £8.5 | £24.6 | £7.9 | £17.2 | £7.0 | £80.1 | £22.4 | <b>£253.5</b> |

**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            |
| 2021 | £51.6 | £24.9 | £18.6 | £11.9 | £7.2  | £11.4 | £32.1 | £11.4 | £23.4 | £10.3 | £101.7 | £30.7 | <b>£335.2</b> |
| 2026 | £59.7 | £28.9 | £21.4 | £13.9 | £8.2  | £13.3 | £38.4 | £13.1 | £27.5 | £11.9 | £118.4 | £35.3 | <b>£390.0</b> |
| 2031 | £69.2 | £33.2 | £24.5 | £16.0 | £9.2  | £15.5 | £45.6 | £15.2 | £32.4 | £13.7 | £137.5 | £40.5 | <b>£452.5</b> |
| 2040 | £91.8 | £43.8 | £31.8 | £21.6 | £11.6 | £20.8 | £61.9 | £19.9 | £44.4 | £18.0 | £183.2 | £53.2 | <b>£602.0</b> |

**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           |
| 2021 | £6.6  | £3.0 | £2.5 | £1.4 | £0.9 | £1.3 | £4.1 | £1.4 | £2.9 | £1.2 | £13.7 | £3.7  | <b>£42.9</b> |
| 2026 | £7.6  | £3.5 | £2.9 | £1.6 | £1.0 | £1.6 | £4.9 | £1.7 | £3.4 | £1.4 | £16.0 | £4.3  | <b>£49.9</b> |
| 2031 | £8.8  | £4.0 | £3.4 | £1.9 | £1.1 | £1.8 | £5.8 | £1.9 | £4.0 | £1.6 | £18.6 | £4.9  | <b>£57.9</b> |
| 2040 | £11.7 | £5.3 | £4.3 | £2.6 | £1.4 | £2.5 | £7.9 | £2.5 | £5.5 | £2.1 | £24.7 | £6.4  | <b>£77.0</b> |

**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            |
| 2021 | £13.8 | £6.6  | £4.5 | £2.8 | £1.9 | £3.0 | £7.8  | £2.8 | £5.5  | £2.6 | £24.7 | £7.4  | <b>£83.3</b>  |
| 2026 | £15.9 | £7.7  | £5.1 | £3.3 | £2.1 | £3.5 | £9.3  | £3.2 | £6.5  | £3.0 | £28.7 | £8.5  | <b>£96.8</b>  |
| 2031 | £18.5 | £8.9  | £5.9 | £3.8 | £2.4 | £4.1 | £11.1 | £3.7 | £7.7  | £3.4 | £33.4 | £9.7  | <b>£112.4</b> |
| 2040 | £24.5 | £11.7 | £7.6 | £5.1 | £3.0 | £5.5 | £15.0 | £4.8 | £10.5 | £4.5 | £44.5 | £12.7 | <b>£149.5</b> |

**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           |
| 2021 | £7.2  | £3.6 | £3.2 | £1.7 | £1.1 | £1.6 | £5.3  | £1.8 | £3.7 | £1.6 | £13.7 | £4.5  | <b>£49.0</b> |
| 2026 | £8.4  | £4.2 | £3.7 | £2.0 | £1.3 | £1.9 | £6.3  | £2.0 | £4.4 | £1.8 | £15.9 | £5.2  | <b>£57.1</b> |
| 2031 | £9.7  | £4.8 | £4.2 | £2.3 | £1.4 | £2.2 | £7.5  | £2.4 | £5.2 | £2.1 | £18.5 | £5.9  | <b>£66.2</b> |
| 2040 | £12.9 | £6.3 | £5.4 | £3.1 | £1.8 | £3.0 | £10.1 | £3.1 | £7.1 | £2.8 | £24.6 | £7.8  | <b>£88.1</b> |

**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              |
| 2021 | £102.0 | £48.8 | £36.3 | £22.8 | £13.9 | £22.1 | £61.9  | £21.9 | £44.7 | £19.6 | £198.4 | £59.3  | <b>£651.5</b>   |
| 2026 | £118.0 | £56.6 | £41.7 | £26.6 | £15.7 | £25.7 | £74.2  | £25.3 | £52.5 | £22.7 | £230.9 | £68.1  | <b>£758.0</b>   |
| 2031 | £136.7 | £65.2 | £47.9 | £30.7 | £17.7 | £30.0 | £88.1  | £29.1 | £61.8 | £26.2 | £268.0 | £78.1  | <b>£879.6</b>   |
| 2040 | £181.4 | £85.9 | £62.0 | £41.4 | £22.4 | £40.2 | £119.5 | £38.2 | £84.7 | £34.5 | £357.1 | £102.5 | <b>£1,170.0</b> |

**Notes:**

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











TABLE 8: COMPARISON GOODS MARKET SHARES

Table with 5 main categories (Clothes and Shoes, Small Household Items, Furniture, Electrical, DIY) and 11 sub-categories each. Rows include various retailers like Argos, B&Q, Matala, etc., and summary rows for Stroud, Dursley, Wotton, Nailsworth, Stonehouse, Other Stroud District, and Outside District.



**TABLE 9a: COMPARISON GOODS TURNOVER, 2021**

|                       | CLOTHES AND SHOES |      |      |      |      |      |       |      |      |      |       | SMALL HOUSEHOLD ITEMS |       |       |      |      |      |      |       |      |       |      | FURNITURE |       |      |      |      |      |      |      |      |      |      | ELECTRICAL |       |      |      |      |      |      |      |      |      |      | DIY  |      |       |      |      |      |      |      |      |      |      | TOTAL |      |      |       |      |        |
|-----------------------|-------------------|------|------|------|------|------|-------|------|------|------|-------|-----------------------|-------|-------|------|------|------|------|-------|------|-------|------|-----------|-------|------|------|------|------|------|------|------|------|------|------------|-------|------|------|------|------|------|------|------|------|------|------|------|-------|------|------|------|------|------|------|------|------|-------|------|------|-------|------|--------|
|                       | 1                 | 2    | 3    | 4a   | 4b   | 5    | 6     | 7    | 8    | 9    | 10    | 11                    | 1     | 2     | 3    | 4a   | 4b   | 5    | 6     | 7    | 8     | 9    | 10        | 11    | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    | 7    | 8    | 9          | 10    | 11   | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    | 7    | 8    | 9    | 10    | 11   | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    |       | 7    | 8    | 9     | 10   | 11     |
| STROUD                | £6.1              | £2.2 | £1.0 | £0.6 | £0.5 | £0.7 | £0.2  | £0.0 | £0.1 | £0.2 | £0.0  | £0.3                  | £31.0 | £9.3  | £8.6 | £6.3 | £2.7 | £4.0 | £2.0  | £0.5 | £0.7  | £0.6 | £2.0      | £2.2  | £2.0 | £0.3 | £0.7 | £0.3 | £0.3 | £0.2 | £0.4 | £0.0 | £0.0 | £0.0       | £0.3  | £0.3 | £5.1 | £1.3 | £1.5 | £0.8 | £0.4 | £0.7 | £0.1 | £0.0 | £0.0 | £0.1 | £0.0  | £0.5 | £5.4 | £2.3 | £1.7 | £1.0 | £0.6 | £0.7 | £1.5 | £0.0  | £0.0 | £0.1 | £0.3  | £1.0 | £111.8 |
| CAM                   | £0.0              | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0                  | £1.1  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.7  | £0.3 | £0.0      | £3.7  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.4 | £0.2 | £0.0  | £1.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0  | £0.4 | £8.3   |
| DURSLEY               | £0.0              | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0      | £3.7  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.1       | £0.0  | £0.4 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0  | £0.5 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0  | £0.9 | £6.1   |
| WOTTON                | £0.0              | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.1 | £0.0 | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £1.0 | £0.7  | £0.3 | £0.0      | £0.0  | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.2 | £0.0       | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £0.0  | £0.0 | £0.0 | £0.0  | £0.0 | £3.8   |
| NAILSWORTH            | £0.0              | £0.0 | £0.0 | £0.1 | £0.0 | £0.6 | £0.2  | £0.1 | £0.0 | £0.0 | £0.0  | £0.0                  | £2.3  | £0.0  | £0.4 | £0.4 | £0.8 | £3.6 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0      | £0.7  | £0.6 | £0.1 | £0.2 | £0.1 | £0.1 | £0.3 | £0.4 | £0.0 | £0.0 | £0.1       | £0.3  | £0.1 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.1 | £0.1 | £0.0 | £0.2 | £0.2 | £0.4 | £0.8 | £1.1 | £0.0  | £0.0 | £0.0 | £0.0  | £0.0 | £15.1  |
| STONEHOUSE            | £0.0              | £0.1 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0                  | £0.0  | £2.5  | £0.0 | £0.0 | £0.2 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0      | £0.0  | £0.2 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £0.7 | £1.7 | £0.1 | £0.2 | £0.0 | £0.1 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.2 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0  | £0.0 | £0.0 | £0.2  | £0.0 | £7.9   |
| OTHER STROUD DISTRICT | £0.0              | £0.3 | £0.0 | £0.0 | £0.1 | £0.1 | £0.2  | £0.0 | £0.0 | £0.1 | £0.0  | £0.0                  | £0.0  | £0.6  | £0.0 | £0.0 | £0.2 | £0.0 | £0.0  | £0.0 | £0.0  | £0.9 | £0.0      | £0.0  | £0.1 | £0.4 | £0.0 | £0.2 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.3  | £0.1 | £0.0 | £0.1 | £0.0 | £0.3 | £0.3 | £0.2 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0  | £0.0 | £0.6 | £0.3 | £0.1 | £0.2 | £0.0 | £0.1 | £0.1 | £0.1  | £0.1 | £0.5 | £1.2  | £0.3 | £8.2   |
| OUTSIDE DISTRICT      | £16.7             | £8.1 | £6.5 | £4.2 | £2.2 | £3.3 | £12.3 | £4.3 | £9.0 | £3.8 | £44.5 | £12.6                 | £17.2 | £12.5 | £9.5 | £5.2 | £3.3 | £3.8 | £30.0 | £9.8 | £21.3 | £8.2 | £99.8     | £20.5 | £3.5 | £1.6 | £1.7 | £0.9 | £0.4 | £0.8 | £3.2 | £1.0 | £2.6 | £1.0       | £12.9 | £2.9 | £7.9 | £3.5 | £2.7 | £1.5 | £1.1 | £1.5 | £7.5 | £2.1 | £5.1 | £1.9 | £24.7 | £5.2 | £1.1 | £0.4 | £1.1 | £0.3 | £0.1 | £0.1 | £2.5 | £1.0  | £3.5 | £0.9 | £12.0 | £1.9 | £490.4 |

Notes:

**TABLE 9b: COMPARISON GOODS TURNOVER, 2026**

|                       | CLOTHES AND SHOES |      |      |      |      |      |       |      |       |      |       | SMALL HOUSEHOLD ITEMS |       |       |       |      |      |      |       |       |       |      | FURNITURE |       |      |      |      |      |      |      |      |      |      | ELECTRICAL |       |      |      |      |      |      |      |      |      |      | DIY  |      |       |      |      |      |      |      |      |      |      | TOTAL |      |      |       |       |        |
|-----------------------|-------------------|------|------|------|------|------|-------|------|-------|------|-------|-----------------------|-------|-------|-------|------|------|------|-------|-------|-------|------|-----------|-------|------|------|------|------|------|------|------|------|------|------------|-------|------|------|------|------|------|------|------|------|------|------|------|-------|------|------|------|------|------|------|------|------|-------|------|------|-------|-------|--------|
|                       | 1                 | 2    | 3    | 4a   | 4b   | 5    | 6     | 7    | 8     | 9    | 10    | 11                    | 1     | 2     | 3     | 4a   | 4b   | 5    | 6     | 7     | 8     | 9    | 10        | 11    | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    | 7    | 8    | 9          | 10    | 11   | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    | 7    | 8    | 9    | 10    | 11   | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    |       | 7    | 8    | 9     | 10    | 11     |
| STROUD                | £7.0              | £2.6 | £1.2 | £0.7 | £0.6 | £0.8 | £0.2  | £0.0 | £0.1  | £0.2 | £0.0  | £0.4                  | £35.8 | £10.8 | £9.9  | £7.4 | £3.0 | £4.7 | £2.5  | £0.6  | £0.8  | £0.7 | £2.3      | £2.5  | £2.3 | £0.4 | £0.8 | £0.3 | £0.3 | £0.3 | £0.5 | £0.0 | £0.0 | £0.0       | £0.3  | £0.3 | £5.9 | £1.5 | £1.7 | £0.9 | £0.5 | £0.8 | £0.1 | £0.1 | £0.0 | £0.2 | £0.0  | £0.6 | £6.2 | £2.6 | £2.0 | £1.2 | £0.6 | £0.8 | £1.8 | £0.1  | £0.1 | £0.2 | £0.4  | £1.1  | £129.6 |
| CAM                   | £0.0              | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £1.3  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0  | £0.8  | £0.3 | £0.0      | £4.2  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.5 | £0.3 | £0.0  | £1.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.1 | £0.0  | £0.5  | £9.6   |
| DURSLEY               | £0.0              | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0  | £0.0  | £0.0 | £0.0      | £4.2  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.1       | £0.0  | £0.5 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.2 | £0.0  | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0  | £1.1  | £7.0   |
| WOTTON                | £0.0              | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.1 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £1.2  | £0.8  | £0.3 | £0.0      | £0.0  | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.3 | £0.0       | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 | £0.1  | £0.0 | £0.0 | £0.0  | £4.3  |        |
| NAILSWORTH            | £0.0              | £0.0 | £0.0 | £0.1 | £0.0 | £0.7 | £0.2  | £0.1 | £0.0  | £0.0 | £0.0  | £0.0                  | £2.7  | £0.0  | £0.5  | £0.4 | £0.9 | £4.1 | £0.0  | £0.0  | £0.0  | £0.0 | £0.0      | £0.8  | £0.7 | £0.2 | £0.2 | £0.1 | £0.2 | £0.3 | £0.5 | £0.0 | £0.0 | £0.1       | £0.3  | £0.1 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.7 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.1 | £0.1 | £0.0 | £0.2 | £0.2 | £0.5 | £0.9 | £1.3 | £0.1  | £0.1 | £0.0 | £0.0  | £17.5 |        |
| STONEHOUSE            | £0.0              | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £2.9  | £0.0  | £0.0 | £0.2 | £0.0 | £0.0  | £0.0  | £0.0  | £0.0 | £0.0      | £0.0  | £0.3 | £0.7 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £0.8 | £2.0 | £0.2 | £0.2 | £0.0 | £0.1 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.2 | £0.7 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0  | £0.0 | £0.0 | £0.2  | £0.0  | £9.1   |
| OTHER STROUD DISTRICT | £0.0              | £0.3 | £0.0 | £0.0 | £0.2 | £0.1 | £0.2  | £0.0 | £0.0  | £0.1 | £0.0  | £0.0                  | £0.0  | £0.7  | £0.0  | £0.0 | £0.2 | £0.0 | £0.0  | £0.0  | £0.0  | £1.0 | £0.0      | £0.0  | £0.1 | £0.5 | £0.0 | £0.2 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0       | £0.3  | £0.1 | £0.0 | £0.1 | £0.0 | £0.3 | £0.3 | £0.2 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0  | £0.0 | £0.7 | £0.3 | £0.2 | £0.3 | £0.0 | £0.1 | £0.2 | £0.1  | £0.2 | £0.5 | £1.4  | £0.3  | £9.5   |
| OUTSIDE DISTRICT      | £19.4             | £9.3 | £7.5 | £4.9 | £2.5 | £3.9 | £14.7 | £5.0 | £10.5 | £4.4 | £51.8 | £14.5                 | £19.9 | £14.4 | £10.9 | £6.1 | £3.7 | £4.4 | £36.0 | £11.4 | £25.0 | £9.5 | £116.1    | £23.6 | £4.0 | £1.8 | £1.9 | £1.0 | £0.5 | £0.9 | £3.8 | £1.2 | £3.1 | £1.1       | £15.0 | £3.3 | £9.2 | £4.0 | £3.1 | £1.7 | £1.2 | £1.7 | £9.0 | £2.4 | £6.0 | £2.2 | £28.7 | £6.0 | £1.2 | £0.5 | £1.3 | £0.3 | £0.1 | £0.1 | £3.0 | £1.2  | £4.1 | £1.1 | £13.9 | £2.2  | £571.3 |

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**TABLE 9c: COMPARISON GOODS TURNOVER, 2021**

|                       | CLOTHES AND SHOES |       |      |      |      |      |       |      |       |      |       | SMALL HOUSEHOLD ITEMS |       |       |       |      |      |      |       |       |       |       | FURNITURE |       |      |      |      |      |      |      |      |      |      | ELECTRICAL |       |      |       |      |      |      |      |      |       |      | DIY  |      |       |      |        |      |      |      |      |      |      | TOTAL |      |      |      |      |        |
|-----------------------|-------------------|-------|------|------|------|------|-------|------|-------|------|-------|-----------------------|-------|-------|-------|------|------|------|-------|-------|-------|-------|-----------|-------|------|------|------|------|------|------|------|------|------|------------|-------|------|-------|------|------|------|------|------|-------|------|------|------|-------|------|--------|------|------|------|------|------|------|-------|------|------|------|------|--------|
|                       | 1                 | 2     | 3    | 4a   | 4b   | 5    | 6     | 7    | 8     | 9    | 10    | 11                    | 1     | 2     | 3     | 4a   | 4b   | 5    | 6     | 7     | 8     | 9     | 10        | 11    | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    | 7    | 8    | 9          | 10    | 11   | 1     | 2    | 3    | 4a   | 4b   | 5    | 6     | 7    | 8    | 9    | 10    | 11   | 1      | 2    | 3    | 4a   | 4b   | 5    | 6    |       | 7    | 8    | 9    | 10   | 11     |
| STROUD                | £8.1              | £2.9  | £1.4 | £0.8 | £0.6 | £0.9 | £0.2  | £0.0 | £0.2  | £0.2 | £0.0  | £0.4                  | £41.5 | £12.5 | £11.4 | £8.5 | £3.4 | £5.5 | £2.9  | £0.7  | £1.0  | £0.8  | £2.6      | £2.9  | £2.7 | £0.4 | £0.9 | £0.4 | £0.3 | £0.3 | £0.6 | £0.0 | £0.0 | £0.0       | £0.4  | £0.4 | £6.9  | £1.7 | £2.0 | £1.1 | £0.6 | £0.9 | £0.2  | £0.1 | £0.0 | £0.2 | £0.0  | £0.6 | £7.2   | £3.0 | £2.3 | £1.3 | £0.7 | £1.0 | £2.1 | £0.1  | £0.1 | £0.2 | £0.5 | £1.3 | £149.8 |
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| WOTTON                | £0.0              | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.2 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £1.4  | £1.0  | £0.4  | £0.0      | £0.0  | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.3 | £0.0       | £0.0  | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.5 | £0.0 | £0.0 | £0.0  | £0.0 | £5.0   |      |      |      |      |      |      |       |      |      |      |      |        |
| NAILSWORTH            | £0.0              | £0.0  | £0.0 | £0.2 | £0.0 | £0.8 | £0.2  | £0.1 | £0.0  | £0.0 | £0.0  | £0.0                  | £3.1  | £0.0  | £0.6  | £0.5 | £1.0 | £4.8 | £0.0  | £0.0  | £0.0  | £0.0  | £0.0      | £1.0  | £0.8 | £0.2 | £0.2 | £0.1 | £0.2 | £0.4 | £0.6 | £0.0 | £0.0 | £0.1       | £0.4  | £0.1 | £0.0  | £0.0 | £0.1 | £0.1 | £0.0 | £0.8 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.2 | £20.4  |      |      |      |      |      |      |       |      |      |      |      |        |
| STONEHOUSE            | £0.0              | £0.2  | £0.0 | £0.1 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £3.3  | £0.0  | £0.0 | £0.3 | £0.0 | £0.0  | £0.0  | £0.0  | £0.0  | £0.0      | £0.0  | £0.3 | £0.8 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £0.9  | £2.3 | £0.2 | £0.3 | £0.0 | £0.1 | £0.2  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £10.5  |      |      |      |      |      |      |       |      |      |      |      |        |
| OTHER STROUD DISTRICT | £0.0              | £0.3  | £0.0 | £0.0 | £0.2 | £0.1 | £0.2  | £0.0 | £0.0  | £0.1 | £0.0  | £0.0                  | £0.0  | £0.8  | £0.0  | £0.0 | £0.3 | £0.0 | £0.0  | £0.0  | £0.0  | £1.2  | £0.0      | £0.0  | £0.2 | £0.5 | £0.0 | £0.2 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0       | £0.4  | £0.1 | £0.0  | £0.1 | £0.0 | £0.4 | £0.4 | £0.3 | £0.0  | £0.0 | £0.0 | £0.1 | £0.0  | £0.0 | £10.9  |      |      |      |      |      |      |       |      |      |      |      |        |
| OUTSIDE DISTRICT      | £22.4             | £10.8 | £8.5 | £5.7 | £2.8 | £4.5 | £17.5 | £5.8 | £12.4 | £5.1 | £60.1 | £16.6                 | £23.1 | £16.6 | £12.5 | £7.0 | £4.2 | £5.2 | £42.7 | £13.1 | £29.4 | £11.0 | £134.8    | £27.0 | £4.7 | £2.1 | £2.2 | £1.2 | £0.5 | £1.1 | £4.5 | £1.3 | £3.6 | £1.3       | £17.4 | £3.8 | £10.6 | £4.6 | £3.5 | £2.0 | £1.4 | £2.0 | £10.7 | £2.8 | £7.1 | £2.6 | £33.4 | £6.8 | £663.8 |      |      |      |      |      |      |       |      |      |      |      |        |

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**TABLE 9d: COMPARISON GOODS TURNOVER, 2040**

|                       | CLOTHES AND SHOES |       |       |      |      |      |       |      |       |      |       | SMALL HOUSEHOLD ITEMS |       |       |       |       |      |      |       |       |       |       | FURNITURE |       |      |      |      |      |      |      |      |      |      | ELECTRICAL |       |      |       |      |      |      |      |      |       |      | DIY  |      |       |      |        |      |      |      |      |      |      | TOTAL |      |      |      |      |        |
|-----------------------|-------------------|-------|-------|------|------|------|-------|------|-------|------|-------|-----------------------|-------|-------|-------|-------|------|------|-------|-------|-------|-------|-----------|-------|------|------|------|------|------|------|------|------|------|------------|-------|------|-------|------|------|------|------|------|-------|------|------|------|-------|------|--------|------|------|------|------|------|------|-------|------|------|------|------|--------|
|                       | 1                 | 2     | 3     | 4a   | 4b   | 5    | 6     | 7    | 8     | 9    | 10    | 11                    | 1     | 2     | 3     | 4a    | 4b   | 5    | 6     | 7     | 8     | 9     | 10        | 11    | 1    | 2    | 3    | 4a   | 4b   | 5    | 6    | 7    | 8    | 9          | 10    | 11   | 1     | 2    | 3    | 4a   | 4b   | 5    | 6     | 7    | 8    | 9    | 10    | 11   | 1      | 2    | 3    | 4a   | 4b   | 5    | 6    |       | 7    | 8    | 9    | 10   | 11     |
| STROUD                | £10.8             | £3.9  | £1.8  | £1.0 | £0.8 | £1.2 | £0.3  | £0.0 | £0.2  | £0.3 | £0.0  | £0.6                  | £55.1 | £16.4 | £14.8 | £11.5 | £4.3 | £7.4 | £3.9  | £0.9  | £1.3  | £1.0  | £3.5      | £3.8  | £3.5 | £0.6 | £1.2 | £0.5 | £0.4 | £0.4 | £0.8 | £0.0 | £0.0 | £0.0       | £0.5  | £0.5 | £9.1  | £2.2 | £2.5 | £1.5 | £0.7 | £1.2 | £0.2  | £0.1 | £0.0 | £0.2 | £0.0  | £0.8 | £9.6   | £4.0 | £2.9 | £1.8 | £0.9 | £1.3 | £2.8 | £0.1  | £0.1 | £0.2 | £0.6 | £1.7 | £198.2 |
| CAM                   | £0.0              | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £2.0  | £0.0  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0  | £0.0  | £1.3  | £0.5  | £0.0      | £6.3  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £0.0  | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0  | £0.0 | £0.3 | £0.8 | £0.4  | £0.0 | £1.9   | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.1 | £0.0 | £0.8 | £14.7  |
| DURSLEY               | £0.0              | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0  | £0.0  | £0.0  | £0.0  | £0.0      | £6.3  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.2 | £0.0 | £0.1       | £0.0  | £0.7 | £0.0  | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.1 | £0.0 | £0.3 | £0.0  | £0.8 | £0.0   | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £1.6 | £10.6  |
| WOTTON                | £0.0              | £0.0  | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.2 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £0.0  | £0.0  | £0.0  | £0.0 | £0.0 | £0.0  | £1.8  | £1.3  | £0.5  | £0.0      | £0.0  | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.5 | £0.0       | £0.0  | £0.0 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0  | £0.7 | £0.0 | £0.0 | £0.0  | £0.0 | £6.7   |      |      |      |      |      |      |       |      |      |      |      |        |
| NAILSWORTH            | £0.0              | £0.0  | £0.0  | £0.2 | £0.0 | £1.1 | £0.3  | £0.1 | £0.0  | £0.0 | £0.0  | £0.0                  | £4.1  | £0.0  | £0.7  | £0.7  | £1.3 | £6.5 | £0.0  | £0.0  | £0.0  | £0.0  | £0.0      | £1.3  | £1.1 | £0.2 | £0.3 | £0.1 | £0.2 | £0.5 | £0.8 | £0.0 | £0.0 | £0.1       | £0.5  | £0.1 | £0.0  | £0.0 | £0.1 | £0.1 | £0.1 | £1.1 | £0.0  | £0.0 | £0.0 | £0.0 | £0.0  | £0.2 | £27.1  |      |      |      |      |      |      |       |      |      |      |      |        |
| STONEHOUSE            | £0.0              | £0.2  | £0.0  | £0.1 | £0.0 | £0.0 | £0.0  | £0.0 | £0.0  | £0.0 | £0.0  | £0.0                  | £0.0  | £4.4  | £0.0  | £0.0  | £0.3 | £0.0 | £0.0  | £0.0  | £0.0  | £0.0  | £0.0      | £0.0  | £0.4 | £1.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0       | £0.0  | £0.0 | £1.2  | £3.0 | £0.2 | £0.4 | £0.1 | £0.2 | £0.2  | £0.0 | £0.0 | £0.0 | £0.0  | £0.0 | £13.9  |      |      |      |      |      |      |       |      |      |      |      |        |
| OTHER STROUD DISTRICT | £0.0              | £0.5  | £0.0  | £0.0 | £0.2 | £0.1 | £0.3  | £0.0 | £0.0  | £0.1 | £0.0  | £0.0                  | £0.0  | £1.1  | £0.0  | £0.0  | £0.3 | £0.0 | £0.0  | £0.0  | £0.0  | £1.5  | £0.0      | £0.0  | £0.2 | £0.7 | £0.0 | £0.3 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0       | £0.5  | £0.1 | £0.0  | £0.2 | £0.0 | £0.5 | £0.4 | £0.3 | £0.0  | £0.0 | £0.0 | £0.2 | £0.0  | £0.0 | £14.4  |      |      |      |      |      |      |       |      |      |      |      |        |
| OUTSIDE DISTRICT      | £29.8             | £14.2 | £11.1 | £7.6 | £3.5 | £6.0 | £23.7 | £7.6 | £17.0 | £6.6 | £80.1 | £21.8                 | £30.6 | £21.9 | £16.3 | £9.5  | £5.3 | £6.9 | £57.9 | £17.2 | £40.3 | £14.4 | £179.7    | £35.4 | £6.2 | £2.8 | £2.8 | £1.6 | £0.7 | £1.4 | £6.2 | £1.7 | £5.0 | £1.7       | £23.2 | £5.0 | £14.1 | £6.1 | £4.6 | £2.7 | £1.7 | £2.6 | £14.5 | £3.7 | £9.7 | £3.4 | £44.5 | £9.0 | £884.4 |      |      |      |      |      |      |       |      |      |      |      |        |

Notes:

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

| STORE / LOCATION                   | FLOORSPACE (sq m net) |                            | CONV GOODS<br>SALES DENSITY<br>(£/sq m) | TOTAL CONVENIENCE<br>GOODS TURNOVER<br>(£m) |
|------------------------------------|-----------------------|----------------------------|---|---|
|                                    | Total Net Sales       | Convenience Goods<br>Sales |   |   |
| <b>STROUD</b>                      |                       |                            |   |   |
| Tesco, Stroud                      | 3,367                 | 2,357                      | 13,797                                  | 32.5  |
| Sainsbury's Stroud                 | 3,812                 | 2,859                      | 11,691                                  | 33.4  |
| Waitrose, Stroud                   | 2,401                 | 2,041                      | 12,940                                  | 26.4  |
| Iceland, Stroud                    | 483                   | 459                        | 6,859                                   | 3.1   |
| Co-op, Cashes Green, Stroud        | 1,068                 | 962                        | 10,824                                  | 10.4  |
| Co-op, Slad Road, Stroud           | 148                   | 133                        | 10,824                                  | 1.4   |
| Other                              |                       | 1,480                      | 5,000                                   | 7.4   |
| <b>TOTAL</b>                       |                       |                            |   | <b>114.7</b>                                |
| <b>CAM</b>                         |                       |                            |   |   |
| Tesco, Cam                         | 1,538                 | 1,307                      | 13,797                                  | 18.0  |
| <b>DURSLEY</b>                     |                       |                            |   |   |
| Iceland, Parsonage Street, Dursley | 500                   | 450                        | 6,859                                   | 3.1   |
| Co-op, Rosebery Road, Dursley      | 141                   | 134                        | 10,824                                  | 1.4   |
| Lidl, Kingshill Road, Dursley      | 643                   | 546                        | 10,103                                  | 5.5   |
| Sainsburys, Dursley                |                       | 1,486                      | 11,691                                  | 17.4  |
| Other                              | 481                   | 433                        | 4,500                                   | 1.9   |
| <b>TOTAL</b>                       |                       |                            |   | <b>29.4</b>                                 |
| <b>WOTTON</b>                      |                       |                            |   |   |
| Co-op                              | 429                   | 386                        | 10,824                                  | 4.2   |
| Tesco Express                      | 150                   | 143                        | 13,797                                  | 2.0   |
| Other                              | 438                   | 438                        | 4,500                                   | 2.0   |
| <b>TOTAL</b>                       |                       |                            |   | <b>8.1</b>                                  |
| <b>NAILSWORTH</b>                  |                       |                            |   |   |
| Morrisons, Nailsworth              | 1159                  | 1,043                      | 12,656                                  | 13.2  |
| Tesco Express, Nailsworth          | 151                   | 143                        | 13,797                                  | 2.0   |
| Co-op                              | 232                   | 209                        | 10,824                                  | 2.3   |
| Other                              |                       | 550                        | 4,500                                   | 2.5   |
| <b>TOTAL</b>                       |                       |                            |   | <b>19.9</b>                                 |
| <b>STONEHOUSE</b>                  |                       |                            |   |   |
| Co-op, High Street, Stonehouse     | 1076                  | 968                        | 10,824                                  | 10.5  |
| Co-op, Eastington                  | 141                   | 134                        | 10,824                                  | 1.4   |
| Co-op, Elm Road, Stonehouse        | 100                   | 95                         | 10,824                                  | 1.0   |
| Co-op, Kings Stanley               | 136                   | 129                        | 10,824                                  | 1.4   |
| Other                              | 254                   | 241                        | 4,500                                   | 1.1   |
| <b>BERKELEY</b>                    | 401                   | 381                        | 4,500                                   | 1.7   |
| <b>MINCHINHAMPTON</b>              | 150                   | 143                        | 4,500                                   | 0.6   |

**TABLE 11: COMMITMENTS IN STROUD DISTRICT**

|                             | FLOORSPACE<br>(sq m net) | SALES DENSITY<br>(£/sq m) | BENCHMARK<br>TURNOVER (£m) |
|-----------------------------|--------------------------|---------------------------|----------------------------|
| <b>Tesco extension, Cam</b> |                          |                           |                            |
| convenience                 | 432                      | 13797                     | 6.0                        |
| comparison                  | 295                      | 7751                      | 2.3                        |
| <b>ALDI, Stroud</b>         | 1,254                    |                           |                            |
| convenience                 | 1,003                    | 10827                     | 10.9                       |
| comparison                  | 251                      | 7312                      | 1.8                        |
| <b>Lidl, Stroud</b>         | 1,327                    |                           |                            |
| convenience                 | 1,062                    | 10103                     | 10.7                       |
| comparison                  | 265                      | 5904                      | 1.6                        |

**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, 2021-2040**

**Stroud**

|  | <b>2021</b>   | <b>2026</b>   | <b>2031</b>   | <b>2040</b>  |
|--|---------------|---------------|---------------|--------------|
| Available convenience goods expenditure                                | £414.6        | £427.9        | £438.7        | £462.3       |
| Turnover from study area   | £109.9        | £112.9        | £115.3        | £120.7       |
| Market share   | 26.5%         | 26.4%         | 26.3%         | 26.1%        |
| Expenditure inflow   | £7.7          | £7.9          | £8.1          | £8.5         |
| Total turnover potential   | £117.6        | £120.8        | £123.3        | £129.2       |
| Benchmark turnover of existing and committed facilities                | £136.3        | £137.43       | £137.43       | £137.43      |
| <b>Residual expenditure</b>  | <b>-£18.7</b> | <b>-£16.6</b> | <b>-£14.1</b> | <b>-£8.3</b> |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000       | £12,096       | £12,096       | £12,096      |
| Indicative retail floorspace capacity (sq m net)                       | <b>-1560</b>  | <b>-1375</b>  | <b>-1165</b>  | <b>-683</b>  |
|  |               |               |               |              |

**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 2021 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.8%pa for 2021-2022 and then nil over the rest of the assessment period.

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, 2021-2040**

**Cam & Dursley**

|  | 2021         | 2026         | 2031         | 2040         |
|--|--------------|--------------|--------------|--------------|
| Available convenience goods expenditure                                | £414.6       | £427.9       | £438.7       | £462.3       |
| Turnover from study area   | £43.4        | £44.3        | £45.0        | £47.0        |
| Market share   | 10.5%        | 10.4%        | 10.3%        | 10.2%        |
| Expenditure inflow   | £2.8         | £2.9         | £2.9         | £3.1         |
| Total turnover potential   | £46.2        | £47.2        | £48.0        | £50.0        |
| Benchmark turnover of existing and committed facilities                | £53.4        | £53.8        | £53.8        | £53.8        |
| <b>Residual expenditure</b>  | <b>-£7.2</b> | <b>-£6.6</b> | <b>-£5.8</b> | <b>-£3.8</b> |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000      | £12,096      | £12,096      | £12,096      |
| Indicative retail floorspace capacity (sq m net)                       | <b>-600</b>  | <b>-544</b>  | <b>-482</b>  | <b>-314</b>  |
|  |              |              |              |              |

**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 2021 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.8%pa for 2021-2022 and then nil over the rest of the assessment period.

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, 2021-2040**

**Nailsworth**

|  | <b>2021</b> | <b>2026</b> | <b>2031</b> | <b>2040</b> |
|--|-------------|-------------|-------------|-------------|
| Available convenience goods expenditure                                | £414.6      | £427.9      | £438.7      | £462.3      |
| Turnover from study area   | £22.3       | £23.0       | £23.6       | £24.9       |
| Market share   | 5.4%        | 5.4%        | 5.4%        | 5.4%        |
| Expenditure inflow   | £1.4        | £1.5        | £1.5        | £1.6        |
| Total turnover potential   | £23.7       | £24.5       | £25.1       | £26.5       |
| Benchmark turnover of existing and committed facilities                | £19.9       | £20.1       | £20.1       | £20.1       |
| <b>Residual expenditure</b>  | <b>£3.8</b> | <b>£4.4</b> | <b>£5.1</b> | <b>£6.4</b> |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000     | £12,096     | £12,096     | £12,096     |
| Indicative retail floorspace capacity (sq m net)                       | <b>316</b>  | <b>363</b>  | <b>419</b>  | <b>531</b>  |
|  |             |             |             |             |

**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 2021 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.8%pa for 2021-2022 and then nil over the rest of the assessment period.

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, 2021-2040**

**Wotton-under-Edge**

|  | <b>2021</b> | <b>2026</b> | <b>2031</b> | <b>2040</b> |
|--|-------------|-------------|-------------|-------------|
| Available convenience goods expenditure                                | £414.6      | £427.9      | £438.7      | £462.3      |
| Turnover from study area   | £9.8        | £10.1       | £10.3       | £10.9       |
| Market share   | 2.4%        | 2.4%        | 2.4%        | 2.4%        |
| Expenditure inflow   | £0.9        | £0.9        | £0.9        | £1.0        |
| Total turnover potential   | £10.7       | £11.0       | £11.3       | £11.9       |
| Benchmark turnover of existing and committed facilities                | £8.1        | £8.2        | £8.2        | £8.2        |
| <b>Residual expenditure</b>  | <b>£2.5</b> | <b>£2.8</b> | <b>£3.1</b> | <b>£3.7</b> |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000     | £12,096     | £12,096     | £12,096     |
| Indicative retail floorspace capacity (sq m net)                       | <b>212</b>  | <b>231</b>  | <b>255</b>  | <b>306</b>  |
|  |             |             |             |             |

**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 2021 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.8%pa for 2021-2022 and then nil over the rest of the assessment period.

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, 2021-2040**

**Stonehouse**

|  | 2021         | 2026         | 2031         | 2040         |
|--|--------------|--------------|--------------|--------------|
| Available convenience goods expenditure                                | £414.6       | £427.9       | £438.7       | £462.3       |
| Turnover from study area   | £10.5        | £10.8        | £11.0        | £11.5        |
| Market share   | 2.5%         | 2.5%         | 2.5%         | 2.5%         |
| Expenditure inflow   | £0.9         | £1.0         | £1.0         | £1.0         |
| Total turnover potential   | £11.4        | £11.8        | £12.0        | £12.5        |
| Benchmark turnover of existing and committed facilities                | £15.4        | £15.6        | £15.6        | £15.6        |
| <b>Residual expenditure</b>  | <b>-£4.0</b> | <b>-£3.8</b> | <b>-£3.6</b> | <b>-£3.0</b> |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000      | £12,096      | £12,096      | £12,096      |
| Indicative retail floorspace capacity (sq m net)                       | <b>-333</b>  | <b>-314</b>  | <b>-297</b>  | <b>-252</b>  |
|  |              |              |              |              |

**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 2021 taken from Tables 10 and 11, projected forward assuming a growth in efficiency of 0.8%pa for 2021-2022 and then nil over the rest of the assessment period.

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, 2021-2040**

**Stroud**

|   | <b>2021</b>  | <b>2026</b>  | <b>2031</b>  | <b>2040</b>  |
|---|--------------|--------------|--------------|--------------|
| Available comparison goods expenditure                                | £651.5       | £758.0       | £879.6       | £1,170.0     |
| Turnover from study area  | £111.8       | £129.6       | £149.8       | £198.2       |
| Market share  | 17.2%        | 17.1%        | 17.0%        | 16.9%        |
| Expenditure inflow  | £6.7         | £7.8         | £9.0         | £11.9        |
| Total turnover potential  | £118.5       | £137.3       | £158.8       | £210.1       |
| Benchmark turnover of existing and committed facilities               | £106.2       | £124.9       | £142.6       | £179.6       |
| <b>Residual expenditure</b>   | <b>£12.3</b> | <b>£12.4</b> | <b>£16.2</b> | <b>£30.5</b> |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,008       | £5,891       | £6,723       | £8,471       |
| Indicative retail floorspace capacity (sq m net)                      | <b>2465</b>  | <b>2110</b>  | <b>2412</b>  | <b>3598</b>  |
|   |              |              |              |              |

**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 and indicative sales density at 2021 linked back to 2013 study for 2018 levels and then Experian's efficiency forecasts for 2018-2040 applied.

**2011 PRICES**

**TABLE 13b: COMPARISON GOODS CAPACITY, 2021-2040**

**Cam & Dursley**

|   | 2021         | 2026         | 2031         | 2040         |
|---|--------------|--------------|--------------|--------------|
| Available comparison goods expenditure                                | £651.5       | £758.0       | £879.6       | £1,170.0     |
| Turnover from study area  | £14.4        | £16.6        | £19.2        | £25.3        |
| Market share  | 2.2%         | 2.2%         | 2.2%         | 2.2%         |
| Expenditure inflow  | £0.6         | £0.7         | £0.8         | £1.0         |
| Total turnover potential  | £15.0        | £17.3        | £19.9        | £26.3        |
| Benchmark turnover of existing and committed facilities               | £18.7        | £22.0        | £25.1        | £31.7        |
| <b>Residual expenditure</b>   | <b>-£3.7</b> | <b>-£4.7</b> | <b>-£5.2</b> | <b>-£5.4</b> |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,008       | £5,891       | £6,723       | £8,471       |
| Indicative retail floorspace capacity (sq m net)                      | <b>-740</b>  | <b>-799</b>  | <b>-774</b>  | <b>-636</b>  |
|   |              |              |              |              |

**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 and indicative sales density at 2021 linked back to 2013 study for 2018 levels and then Experian's efficiency forecasts for 2018-2040 applied.

**2011 PRICES**

**TABLE 13c: COMPARISON GOODS CAPACITY, 2021-2040**

**Nailsworth**

|   | 2021        | 2026        | 2031        | 2040        |
|---|-------------|-------------|-------------|-------------|
| Available comparison goods expenditure                                | £651.5      | £758.0      | £879.6      | £1,170.0    |
| Turnover from study area  | £15.1       | £17.5       | £20.4       | £27.1       |
| Market share  | 2.3%        | 2.3%        | 2.3%        | 2.3%        |
| Expenditure inflow  | £0.6        | £0.7        | £0.8        | £1.1        |
| Total turnover potential  | £15.7       | £18.3       | £21.2       | £28.1       |
| Benchmark turnover of existing and committed facilities               | £13.9       | £16.3       | £18.6       | £23.4       |
| <b>Residual expenditure</b>   | <b>£1.9</b> | <b>£1.9</b> | <b>£2.6</b> | <b>£4.7</b> |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,008      | £5,891      | £6,723      | £8,471      |
| Indicative retail floorspace capacity (sq m net)                      | <b>370</b>  | <b>331</b>  | <b>385</b>  | <b>555</b>  |
|   |             |             |             |             |

**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 and indicative sales density at 2021 linked back to 2013 study for 2018 levels and then Experian's efficiency forecasts for 2018-2040 applied.

**2011 PRICES**

**TABLE 13d: COMPARISON GOODS CAPACITY, 2021-2040**

**Wotton-under-Edge**

|   | 2021        | 2026        | 2031        | 2040        |
|---|-------------|-------------|-------------|-------------|
| Available comparison goods expenditure                                | £651.5      | £758.0      | £879.6      | £1,170.0    |
| Turnover from study area  | £3.8        | £4.3        | £5.0        | £6.7        |
| Market share  | 0.6%        | 0.6%        | 0.6%        | 0.6%        |
| Expenditure inflow  | £0.3        | £0.3        | £0.4        | £0.5        |
| Total turnover potential  | £4.1        | £4.7        | £5.4        | £7.2        |
| Benchmark turnover of existing and committed facilities               | £3.7        | £4.4        | £5.0        | £6.3        |
| <b>Residual expenditure</b>   | <b>£0.3</b> | <b>£0.3</b> | <b>£0.5</b> | <b>£1.0</b> |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,008      | £5,891      | £6,723      | £8,471      |
| Indicative retail floorspace capacity (sq m net)                      | <b>70</b>   | <b>58</b>   | <b>71</b>   | <b>115</b>  |
|   |             |             |             |             |

**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 and indicative sales density at 2021 linked back to 2013 study for 2018 levels and then Experian's efficiency forecasts for 2018-2040 applied.

**2011 PRICES**

**TABLE 13e: COMPARISON GOODS CAPACITY, 2021-2040**

**Stonehouse**

|   | <b>2021</b> | <b>2026</b> | <b>2031</b> | <b>2040</b> |
|---|-------------|-------------|-------------|-------------|
| Available comparison goods expenditure                                | £651.5      | £758.0      | £879.6      | £1,170.0    |
| Turnover from study area  | £7.9        | £9.1        | £10.5       | £13.9       |
| Market share  | 1.2%        | 1.2%        | 1.2%        | 1.2%        |
| Expenditure inflow  | £0.6        | £0.7        | £0.8        | £1.1        |
| Total turnover potential  | £8.5        | £9.9        | £11.4       | £15.0       |
| Benchmark turnover of existing and committed facilities               | £7.4        | £8.7        | £9.9        | £12.5       |
| <b>Residual expenditure</b>   | <b>£1.1</b> | <b>£1.2</b> | <b>£1.4</b> | <b>£2.5</b> |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,008      | £5,891      | £6,723      | £8,471      |
| Indicative retail floorspace capacity (sq m net)                      | <b>221</b>  | <b>196</b>  | <b>214</b>  | <b>296</b>  |
|   |             |             |             |             |

**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 and indicative sales density at 2021 linked back to 2013 study for 2018 levels and then Experian's efficiency forecasts for 2018-2040 applied.

**2011 PRICES**

# Appendix III

## Study Area



