

## **APPENDIX D**

### **Capacity Assessment**

## Gloucester, Cheltenham and Tewkesbury JCS Retail Study

**Table 1 Population**

Zone	2009	2010	2011	2012	2013	2014	2015	2016	2021	2026	2031
1	113231	113818	114307	114893	115382	115871	116458	117044	119685	122129	123987
2	14787	14860	14933	15005	15078	15151	15224	15296	15678	16006	16242
3	29745	29885	29991	30096	30202	30272	30377	30447	30869	31220	31431
4	9450	9495	9528	9562	9595	9617	9651	9673	9807	9919	9986
5	152793	154307	155947	157461	159228	160868	162634	164527	173737	182822	191401
6	16043	16100	16177	16215	16272	16329	16367	16425	16634	16806	16882
7	36436	36615	36795	36974	37153	37332	37512	37691	38632	39439	40021
8	66383	66667	66894	67178	67462	67689	67973	68257	69790	71380	72686
9	98116	98545	98974	99402	99831	100260	100689	101032	103176	105063	106435
10	34258	34420	34541	34662	34784	34865	34986	35067	35552	35957	36199
11	26939	27035	27163	27227	27323	27419	27484	27580	27932	28220	28348
12	35156	35281	35449	35532	35658	35783	35867	35992	36452	36828	36995
<b>Total</b>	<b>633337</b>	<b>637028</b>	<b>640697</b>	<b>644209</b>	<b>647968</b>	<b>651457</b>	<b>655221</b>	<b>659031</b>	<b>677945</b>	<b>695788</b>	<b>710615</b>

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Gloucestershire County Council trend based forecasts (May 2011)

## Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 2a Expenditure per head - convenience goods £

Zone	2009	2010	2011	2012	2013	2014	2015	2016	2021	2026	2031
1	1932	1947	1942	1934	1944	1953	1963	1973	2029	2090	2154
2	1999	2015	2009	2001	2011	2021	2031	2041	2099	2163	2228
3	2062	2078	2072	2064	2074	2085	2095	2106	2165	2231	2299
4	2138	2155	2149	2140	2151	2161	2172	2183	2245	2313	2383
5	1865	1880	1874	1867	1876	1885	1895	1904	1958	2018	2079
6	1984	2000	1994	1986	1996	2006	2016	2026	2083	2147	2212
7	1972	1988	1982	1974	1984	1994	2004	2014	2071	2134	2198
8	1963	1979	1973	1965	1975	1985	1994	2004	2061	2124	2188
9	1933	1948	1943	1935	1945	1954	1964	1974	2030	2091	2155
10	1924	1939	1934	1926	1935	1945	1955	1965	2020	2082	2145
11	1884	1899	1893	1886	1895	1905	1914	1924	1978	2038	2100
12	1875	1890	1884	1877	1886	1896	1905	1915	1969	2029	2090

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 2b Expenditure per head - comparison goods £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	3041	3044	3059	3108	3173	3269	3367	3468	4020	4660	5403
2	3150	3153	3169	3220	3287	3386	3487	3592	4164	4827	5596
3	3217	3220	3236	3288	3357	3458	3562	3668	4253	4930	5715
4	3421	3424	3442	3497	3570	3677	3787	3901	4522	5243	6078
5	2888	2891	2905	2952	3014	3104	3197	3293	3818	4426	5131
6	3186	3189	3205	3256	3325	3425	3527	3633	4212	4883	5660
7	3156	3159	3175	3226	3293	3392	3494	3599	4172	4837	5607
8	3096	3099	3115	3164	3231	3328	3428	3530	4093	4745	5500
9	3033	3036	3051	3100	3165	3260	3358	3459	4009	4648	5388
10	3059	3062	3077	3127	3192	3288	3387	3488	4044	4688	5435
11	2841	2844	2858	2904	2965	3054	3145	3240	3756	4354	5047
12	2852	2855	2869	2915	2976	3066	3158	3252	3770	4371	5067

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 2c Expenditure per head - bulky comparison goods £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	1023	1024	1029	1046	1068	1100	1133	1167	1352	1568	1817
2	1077	1078	1083	1101	1124	1158	1192	1228	1424	1651	1913
3	1112	1113	1119	1137	1160	1195	1231	1268	1470	1704	1976
4	1194	1195	1201	1220	1246	1283	1322	1362	1578	1830	2121
5	982	983	988	1004	1025	1056	1087	1120	1298	1505	1745
6	1093	1094	1100	1117	1141	1175	1210	1246	1445	1675	1942
7	1053	1054	1059	1076	1099	1132	1166	1201	1392	1614	1871
8	1006	1007	1012	1028	1050	1081	1114	1147	1330	1542	1787
9	1043	1044	1049	1066	1088	1121	1155	1189	1379	1598	1853
10	1046	1047	1052	1069	1092	1124	1158	1193	1383	1603	1858
11	972	973	978	993	1014	1045	1076	1108	1285	1490	1727
12	974	975	980	996	1016	1047	1078	1111	1288	1493	1730

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 2d Expenditure per head - non-bulky comparison goods £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	2018	2020	2030	2063	2106	2169	2234	2301	2668	3093	3585
2	2073	2075	2085	2119	2163	2228	2295	2364	2740	3177	3683
3	2105	2107	2118	2152	2197	2263	2330	2400	2783	3226	3740
4	2227	2229	2240	2276	2324	2394	2466	2540	2944	3413	3956
5	1906	1908	1917	1948	1989	2049	2110	2173	2520	2921	3386
6	2093	2095	2106	2139	2184	2250	2317	2387	2767	3208	3718
7	2103	2105	2116	2149	2195	2260	2328	2398	2780	3223	3736
8	2090	2092	2103	2136	2181	2246	2314	2383	2763	3203	3713
9	1990	1992	2002	2034	2077	2139	2203	2269	2631	3050	3535
10	2013	2015	2025	2057	2101	2164	2229	2295	2661	3085	3576
11	1869	1871	1880	1910	1950	2009	2069	2131	2471	2864	3320
12	1878	1880	1889	1920	1960	2019	2079	2142	2483	2878	3336

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 3a Expenditure per head - clothing and footwear £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	698	699	702	713	728	750	773	796	923	1070	1240
2	698	699	702	713	728	750	773	796	923	1070	1240
3	651	652	655	665	679	700	721	742	861	998	1157
4	702	703	706	718	733	755	777	801	928	1076	1247
5	647	648	651	661	675	695	716	738	855	992	1149
6	661	662	665	676	690	710	732	754	874	1013	1174
7	730	731	734	746	762	785	808	832	965	1119	1297
8	749	750	753	766	782	805	829	854	990	1148	1331
9	657	658	661	672	686	706	727	749	869	1007	1167
10	657	658	661	672	686	706	727	749	869	1007	1167
11	611	612	615	625	638	657	676	697	808	936	1086
12	616	617	620	630	643	662	682	702	814	944	1094

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 3b Expenditure per head - other comparison goods £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	1281	1282	1289	1309	1337	1377	1418	1461	1693	1963	2276
2	1331	1332	1339	1360	1389	1431	1474	1518	1760	2040	2365
3	1408	1409	1416	1439	1469	1513	1559	1606	1861	2158	2501
4	1474	1475	1483	1507	1538	1584	1632	1681	1949	2259	2619
5	1221	1222	1228	1248	1274	1312	1352	1392	1614	1871	2169
6	1388	1389	1396	1419	1448	1492	1537	1583	1835	2127	2466
7	1331	1332	1339	1360	1389	1431	1474	1518	1760	2040	2365
8	1301	1302	1309	1330	1358	1398	1440	1484	1720	1994	2311
9	1289	1290	1297	1317	1345	1386	1427	1470	1704	1975	2290
10	1315	1316	1323	1344	1372	1413	1456	1500	1738	2015	2336
11	1221	1222	1228	1248	1274	1312	1352	1392	1614	1871	2169
12	1225	1226	1232	1252	1278	1317	1356	1397	1619	1877	2176

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)



**Table 3c Expenditure per head - DIY goods £**

Zone	2009	2010	2011	2012	2013	2014	2015	2016	2021	2026	2031
1	347	347	349	355	362	373	384	396	459	532	616
2	369	369	371	377	385	397	409	421	488	565	656
3	410	410	412	419	428	441	454	468	542	628	728
4	447	447	450	457	466	480	495	510	591	685	794
5	333	333	335	340	348	358	369	380	440	510	592
6	416	416	418	425	434	447	461	474	550	638	739
7	334	334	336	341	349	359	370	381	442	512	593
8	288	288	290	294	301	310	319	328	381	441	512
9	372	372	374	380	388	400	412	424	492	570	661
10	373	373	375	381	389	401	413	425	493	572	663
11	352	352	354	360	367	378	390	401	465	539	625
12	351	351	353	359	366	377	389	400	464	538	624

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 3d Expenditure per head - large electrical goods £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	93	93	94	95	97	100	103	106	123	143	165
2	96	96	97	98	100	103	106	109	127	147	171
3	99	99	100	101	103	106	110	113	131	152	176
4	99	99	100	101	103	106	110	113	131	152	176
5	94	94	95	96	98	101	104	107	124	144	167
6	93	93	94	95	97	100	103	106	123	143	165
7	81	81	81	83	85	87	90	92	107	124	144
8	66	66	66	67	69	71	73	75	87	101	117
9	94	94	95	96	98	101	104	107	124	144	167
10	94	94	95	96	98	101	104	107	124	144	167
11	94	94	95	96	98	101	104	107	124	144	167
12	93	93	94	95	97	100	103	106	123	143	165

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 3e Expenditure per head - small electrical goods £**

Zone	2009	2010	2011	2012	2013	2014	2015	2016	2021	2026	2031
1	353	353	355	361	368	379	391	403	467	541	627
2	359	359	361	367	375	386	397	409	475	550	638
3	351	351	353	359	366	377	389	400	464	538	624
4	376	376	378	384	392	404	416	429	497	576	668
5	336	336	338	343	351	361	372	383	444	515	597
6	340	340	342	348	355	365	376	388	449	521	604
7	390	390	392	399	407	419	432	445	516	598	693
8	407	407	409	416	425	437	451	464	538	624	723
9	348	348	350	356	363	374	385	397	460	533	618
10	342	342	344	350	357	368	379	390	452	524	608
11	326	326	328	333	340	350	361	372	431	500	579
12	324	324	326	331	338	348	359	369	428	497	576

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Table 3f Expenditure per head - furniture, floor coverings etc £**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	269	269	271	275	281	289	298	307	356	412	478
2	297	297	299	304	310	319	329	339	393	455	528
3	298	298	300	305	311	320	330	340	394	457	529
4	323	323	325	330	337	347	358	368	427	495	574
5	257	257	259	263	268	276	285	293	340	394	457
6	288	288	290	294	301	310	319	328	381	441	512
7	290	290	292	296	303	312	321	331	383	444	515
8	285	285	287	291	297	306	316	325	377	437	506
9	273	273	275	279	285	293	302	311	361	418	485
10	278	278	280	284	290	299	308	317	368	426	494
11	237	237	238	242	247	255	262	270	313	363	421
12	243	243	244	248	254	261	269	277	321	372	432

Source: 2009 Experian Population and Expenditure (June 2011)

Forecasts: Experian Retail Planner Briefing Note 9 (September 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 4a Total Expenditure - convenience goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	218.76	221.65	221.94	222.19	224.25	226.32	228.61	230.91	242.80	255.28	267.04
2	29.56	29.94	30.00	30.02	30.32	30.62	30.92	31.22	32.91	34.62	36.19
3	61.33	62.12	62.15	62.12	62.65	63.11	63.64	64.11	66.84	69.65	72.25
4	20.20	20.46	20.47	20.46	20.64	20.79	20.96	21.12	22.02	22.94	23.80
5	284.96	290.08	292.29	293.95	298.73	303.32	308.18	313.32	340.23	368.89	397.93
6	31.83	32.20	32.25	32.20	32.48	32.75	32.99	33.27	34.65	36.07	37.34
7	71.85	72.78	72.92	72.98	73.70	74.43	75.16	75.90	79.99	84.14	87.98
8	130.31	131.91	131.97	132.00	133.22	134.33	135.57	136.82	143.85	151.60	159.06
9	189.66	192.01	192.27	192.33	194.12	195.93	197.75	199.42	209.42	219.72	229.35
10	65.91	66.75	66.79	66.75	67.32	67.82	68.39	68.89	71.83	74.85	77.64
11	50.75	51.34	51.43	51.35	51.78	52.23	52.61	53.06	55.26	57.52	59.54
12	65.92	66.68	66.80	66.69	67.26	67.83	68.33	68.91	71.77	74.71	77.33
<b>Total</b>	<b>1221.05</b>	<b>1237.944</b>	<b>1241.271</b>	<b>1243.03</b>	<b>1256.464</b>	<b>1269.475</b>	<b>1283.126</b>	<b>1296.956</b>	<b>1371.568</b>	<b>1450.006</b>	<b>1525.445</b>

Source: Table 1 x Table 2a

**Table 4b Total Expenditure - comparison goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	318.51	346.47	349.69	357.11	366.16	378.75	392.08	405.88	481.14	569.17	669.86
2	43.09	46.86	47.32	48.31	49.56	51.30	53.09	54.94	65.29	77.27	90.90
3	88.51	96.24	97.06	98.96	101.39	104.68	108.19	111.69	131.28	153.92	179.64
4	29.90	32.51	32.79	33.43	34.25	35.36	36.55	37.74	44.35	52.00	60.69
5	408.17	446.08	453.08	464.80	479.88	499.37	520.00	541.83	663.30	809.15	982.05
6	47.28	51.35	51.85	52.80	54.10	55.92	57.73	59.67	70.06	82.06	95.56
7	106.37	115.67	116.82	119.27	122.36	126.64	131.07	135.65	161.18	190.75	224.40
8	190.11	206.61	208.35	212.58	217.96	225.26	232.99	240.98	285.64	338.67	399.80
9	275.27	299.19	301.99	308.15	315.98	326.86	338.10	349.43	413.68	488.34	573.52
10	96.94	105.40	106.30	108.38	111.04	114.64	118.49	122.32	143.77	168.56	196.73
11	70.79	76.88	77.63	79.06	81.01	83.73	86.44	89.35	104.90	122.87	143.08
12	92.75	100.72	101.71	103.58	106.13	109.69	113.25	117.05	137.43	160.97	187.45
<b>Total</b>	<b>1767.68</b>	<b>1923.97</b>	<b>1944.59</b>	<b>1986.43</b>	<b>2039.83</b>	<b>2112.19</b>	<b>2187.99</b>	<b>2266.54</b>	<b>2702.01</b>	<b>3213.72</b>	<b>3803.66</b>

Source: Table 1 x Table 2b

**Table 4c Total Expenditure - bulky comparison goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	107.15	116.55	117.64	120.13	123.18	127.41	131.90	136.54	161.86	191.47	225.34
2	14.73	16.02	16.18	16.52	16.95	17.54	18.15	18.79	22.32	26.42	31.08
3	30.60	33.27	33.55	34.21	35.05	36.18	37.40	38.61	45.38	53.20	62.09
4	10.44	11.35	11.44	11.67	11.96	12.34	12.76	13.17	15.48	18.15	21.18
5	138.79	151.68	154.06	158.04	163.17	169.80	176.81	184.24	225.54	275.13	333.92
6	16.22	17.62	17.79	18.11	18.56	19.18	19.81	20.47	24.03	28.15	32.78
7	35.49	38.59	38.98	39.79	40.83	42.25	43.73	45.26	53.78	63.64	74.87
8	61.77	67.13	67.70	69.07	70.82	73.19	75.71	78.30	92.81	110.05	129.91
9	94.66	102.89	103.85	105.97	108.66	112.40	116.27	120.16	142.26	167.93	197.22
10	33.15	36.04	36.35	37.06	37.97	39.20	40.52	41.83	49.16	57.64	67.27
11	24.22	26.30	26.56	27.05	27.72	28.65	29.58	30.57	35.89	42.04	48.95
12	31.67	34.40	34.73	35.37	36.24	37.46	38.68	39.98	46.93	54.97	64.02
<b>Total</b>	<b>598.88</b>	<b>651.84</b>	<b>658.83</b>	<b>673.00</b>	<b>691.10</b>	<b>715.62</b>	<b>741.30</b>	<b>767.91</b>	<b>915.45</b>	<b>1088.80</b>	<b>1288.64</b>

Source: Table 1 x Table 2c

**Table 4d Total Expenditure - non-bulky comparison goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	211.36	229.91	232.06	236.98	242.99	251.34	260.19	269.34	319.28	377.70	444.52
2	28.35	30.84	31.14	31.79	32.62	33.76	34.94	36.16	42.96	50.85	59.82
3	57.92	62.97	63.51	64.75	66.34	68.49	70.79	73.09	85.90	100.71	117.54
4	19.47	21.17	21.35	21.76	22.30	23.02	23.79	24.57	28.87	33.85	39.51
5	269.38	294.40	299.02	306.75	316.71	329.57	343.19	357.59	437.76	534.02	648.12
6	31.06	33.73	34.06	34.69	35.54	36.74	37.93	39.20	46.02	53.91	62.78
7	70.88	77.08	77.84	79.47	81.54	84.39	87.34	90.39	107.40	127.11	149.53
8	128.33	139.47	140.65	143.51	147.14	152.06	157.28	162.68	192.82	228.63	269.89
9	180.61	196.30	198.14	202.18	207.32	214.46	221.83	229.27	271.43	320.41	376.29
10	63.79	69.36	69.95	71.32	73.07	75.44	77.97	80.50	94.61	110.92	129.46
11	46.57	50.58	51.07	52.01	53.29	55.08	56.87	58.78	69.01	80.83	94.13
12	61.07	66.32	66.97	68.20	69.88	72.23	74.57	77.08	90.50	105.99	123.43
<b>Total</b>	<b>1168.80</b>	<b>1272.13</b>	<b>1285.76</b>	<b>1313.43</b>	<b>1348.74</b>	<b>1396.58</b>	<b>1446.69</b>	<b>1498.63</b>	<b>1786.57</b>	<b>2124.92</b>	<b>2515.02</b>

Source: Table 1 x Table 2d



**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 5a Total Expenditure - clothing and footwear £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	73.11	79.52	80.27	81.97	84.05	86.93	89.99	93.16	110.44	130.64	153.75
2	9.55	10.38	10.49	10.71	10.98	11.37	11.76	12.18	14.47	17.12	20.14
3	17.91	19.47	19.64	20.03	20.52	21.18	21.89	22.60	26.57	31.15	36.35
4	6.14	6.67	6.73	6.86	7.03	7.26	7.50	7.74	9.10	10.67	12.45
5	91.44	99.94	101.50	104.13	107.51	111.87	116.50	121.39	148.60	181.27	220.01
6	9.81	10.65	10.76	10.95	11.22	11.60	11.98	12.38	14.54	17.02	19.83
7	24.60	26.76	27.02	27.59	28.30	29.29	30.32	31.38	37.28	44.12	51.90
8	45.99	49.98	50.40	51.43	52.73	54.50	56.37	58.30	69.10	81.93	96.72
9	59.63	64.81	65.42	66.75	68.45	70.80	73.24	75.69	89.61	105.78	124.23
10	20.82	22.64	22.83	23.28	23.85	24.62	25.45	26.27	30.88	36.20	42.25
11	15.23	16.53	16.70	17.00	17.42	18.01	18.59	19.22	22.56	26.42	30.77
12	20.03	21.76	21.97	22.37	22.92	23.69	24.46	25.28	29.68	34.77	40.49
<b>Total</b>	<b>394.25</b>	<b>429.12</b>	<b>433.72</b>	<b>443.06</b>	<b>454.98</b>	<b>471.13</b>	<b>488.05</b>	<b>505.59</b>	<b>602.82</b>	<b>717.11</b>	<b>848.90</b>

Source: Table 1 x Table 3a

**Table 5b Total Expenditure - other comparison goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	134.17	145.95	147.31	150.43	154.24	159.54	165.16	170.97	202.68	239.76	282.17
2	18.21	19.80	19.99	20.41	20.94	21.68	22.43	23.22	27.59	32.65	38.41
3	38.74	42.12	42.48	43.31	44.38	45.81	47.35	48.89	57.46	67.37	78.62
4	12.88	14.01	14.13	14.41	14.76	15.24	15.75	16.26	19.11	22.41	26.15
5	172.57	188.60	191.56	196.51	202.89	211.13	219.85	229.08	280.43	342.10	415.19
6	20.60	22.37	22.59	23.00	23.57	24.36	25.15	26.00	30.52	35.75	41.63
7	44.86	48.78	49.27	50.30	51.61	53.41	55.28	57.21	67.97	80.45	94.64
8	79.89	86.82	87.55	89.33	91.59	94.66	97.91	101.26	120.03	142.32	168.00
9	116.99	127.15	128.34	130.96	134.29	138.91	143.69	148.51	175.81	207.54	243.74
10	41.67	45.31	45.69	46.59	47.73	49.28	50.93	52.58	61.80	72.46	84.57
11	30.43	33.04	33.37	33.98	34.82	35.99	37.15	38.40	45.09	52.81	61.49
12	39.84	43.26	43.69	44.49	45.58	47.12	48.64	50.28	59.03	69.14	80.51
<b>Total</b>	<b>750.83</b>	<b>817.21</b>	<b>825.96</b>	<b>843.72</b>	<b>866.40</b>	<b>897.12</b>	<b>929.30</b>	<b>962.65</b>	<b>1147.52</b>	<b>1364.73</b>	<b>1615.13</b>

Source: Table 1 x Table 3b

**Table 5c Total Expenditure - DIY goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	36.34	39.53	39.90	40.75	41.78	43.22	44.74	46.31	54.90	64.95	76.44
2	5.05	5.49	5.54	5.66	5.81	6.01	6.22	6.44	7.65	9.05	10.65
3	11.28	12.27	12.37	12.61	12.92	13.34	13.79	14.24	16.73	19.62	22.89
4	3.91	4.25	4.28	4.37	4.48	4.62	4.78	4.93	5.80	6.79	7.93
5	47.06	51.44	52.24	53.59	55.33	57.58	59.96	62.48	76.48	93.30	113.23
6	6.17	6.70	6.77	6.89	7.06	7.30	7.54	7.79	9.15	10.71	12.48
7	11.26	12.24	12.36	12.62	12.95	13.40	13.87	14.36	17.06	20.19	23.75
8	17.68	19.22	19.38	19.77	20.28	20.95	21.67	22.42	26.57	31.50	37.19
9	33.76	36.70	37.04	37.79	38.76	40.09	41.47	42.86	50.74	59.90	70.34
10	11.82	12.85	12.96	13.21	13.54	13.98	14.45	14.92	17.53	20.55	23.99
11	8.77	9.53	9.62	9.80	10.04	10.37	10.71	11.07	13.00	15.22	17.73
12	11.41	12.40	12.52	12.75	13.06	13.50	13.94	14.41	16.91	19.81	23.07
<b>Total</b>	<b>204.53</b>	<b>222.61</b>	<b>224.99</b>	<b>229.83</b>	<b>236.00</b>	<b>244.37</b>	<b>253.13</b>	<b>262.21</b>	<b>312.51</b>	<b>371.60</b>	<b>439.69</b>

Source: Table 1 x Table 3c

**Table 5d Total Expenditure - large electrical goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	9.74	10.60	10.69	10.92	11.20	11.58	11.99	12.41	14.71	17.41	20.49
2	1.31	1.43	1.44	1.47	1.51	1.56	1.62	1.67	1.99	2.35	2.77
3	2.72	2.96	2.99	3.05	3.12	3.22	3.33	3.44	4.04	4.74	5.53
4	0.87	0.94	0.95	0.97	0.99	1.02	1.06	1.09	1.28	1.50	1.76
5	13.29	14.52	14.75	15.13	15.62	16.25	16.93	17.64	21.59	26.34	31.96
6	1.38	1.50	1.51	1.54	1.58	1.63	1.69	1.74	2.05	2.40	2.79
7	2.73	2.97	3.00	3.06	3.14	3.25	3.36	3.48	4.14	4.90	5.76
8	4.05	4.40	4.44	4.53	4.65	4.80	4.97	5.14	6.09	7.22	8.52
9	8.53	9.27	9.36	9.55	9.79	10.13	10.48	10.83	12.82	15.13	17.77
10	2.98	3.24	3.27	3.33	3.41	3.52	3.64	3.76	4.42	5.18	6.05
11	2.34	2.54	2.57	2.62	2.68	2.77	2.86	2.96	3.47	4.07	4.73
12	3.02	3.28	3.32	3.38	3.46	3.58	3.69	3.82	4.48	5.25	6.11
<b>Total</b>	<b>52.97</b>	<b>57.66</b>	<b>58.28</b>	<b>59.54</b>	<b>61.15</b>	<b>63.33</b>	<b>65.61</b>	<b>67.97</b>	<b>81.08</b>	<b>96.48</b>	<b>114.24</b>

Source: Table 1 x Table 3d

**Table 5e Total Expenditure - small electrical goods £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	36.97	40.22	40.59	41.45	42.50	43.96	45.51	47.11	55.85	66.07	77.76
2	4.91	5.34	5.39	5.51	5.65	5.85	6.05	6.26	7.44	8.81	10.36
3	9.66	10.50	10.59	10.80	11.06	11.42	11.80	12.19	14.32	16.79	19.60
4	3.29	3.57	3.60	3.67	3.76	3.89	4.02	4.15	4.87	5.72	6.67
5	47.49	51.90	52.71	54.08	55.83	58.10	60.50	63.04	77.17	94.14	114.25
6	5.05	5.48	5.53	5.63	5.77	5.97	6.16	6.37	7.48	8.76	10.20
7	13.14	14.29	14.44	14.74	15.12	15.65	16.20	16.76	19.92	23.57	27.73
8	24.99	27.16	27.39	27.95	28.65	29.61	30.63	31.68	37.55	44.52	52.56
9	31.58	34.33	34.65	35.36	36.25	37.50	38.79	40.09	47.47	56.03	65.80
10	10.84	11.78	11.88	12.12	12.41	12.82	13.25	13.68	16.07	18.85	21.99
11	8.12	8.82	8.91	9.07	9.30	9.61	9.92	10.25	12.04	14.10	16.42
12	10.54	11.44	11.55	11.77	12.06	12.46	12.87	13.30	15.61	18.29	21.30
<b>Total</b>	<b>206.58</b>	<b>224.84</b>	<b>227.25</b>	<b>232.14</b>	<b>238.38</b>	<b>246.84</b>	<b>255.70</b>	<b>264.88</b>	<b>315.79</b>	<b>375.64</b>	<b>444.64</b>

Source: Table 1 x Table 3e

**Table 5f Total Expenditure - furniture, floor coverings etc £m**

<b>Zone</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
1	28.17	30.65	30.93	31.59	32.39	33.50	34.68	35.90	42.56	50.35	59.25
2	4.06	4.42	4.46	4.56	4.67	4.84	5.01	5.18	6.16	7.29	8.57
3	8.20	8.91	8.99	9.17	9.39	9.70	10.02	10.35	12.16	14.26	16.64
4	2.82	3.07	3.10	3.16	3.23	3.34	3.45	3.56	4.19	4.91	5.73
5	36.32	39.70	40.32	41.36	42.70	44.44	46.27	48.22	59.03	72.01	87.39
6	4.27	4.64	4.69	4.77	4.89	5.05	5.22	5.39	6.33	7.42	8.64
7	9.77	10.63	10.73	10.96	11.24	11.64	12.04	12.46	14.81	17.53	20.62
8	17.50	19.02	19.18	19.57	20.06	20.74	21.45	22.18	26.29	31.18	36.80
9	24.78	26.93	27.18	27.74	28.44	29.42	30.43	31.45	37.24	43.96	51.62
10	8.81	9.58	9.66	9.85	10.09	10.42	10.77	11.12	13.07	15.32	17.88
11	5.91	6.41	6.48	6.60	6.76	6.98	7.21	7.45	8.75	10.25	11.94
12	7.90	8.58	8.67	8.83	9.04	9.35	9.65	9.97	11.71	13.71	15.97
<b>Total</b>	<b>158.52</b>	<b>172.54</b>	<b>174.39</b>	<b>178.14</b>	<b>182.92</b>	<b>189.41</b>	<b>196.21</b>	<b>203.25</b>	<b>242.29</b>	<b>288.17</b>	<b>341.06</b>

Source: Table 1 x Table 3f







Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 8 Market Share - convenience goods (combined) 2009

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
Aldi, Bristol Road, Gloucester	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99
Aldi, Tewkesbury Road, Cheltenham	2.50	0.33	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.97
Asda, Bruton Way, Gloucester	0.00	0.00	0.00	0.00	35.36	1.22	0.00	0.00	0.00	0.00	2.17	0.48	39.24
Co-op The Green, Bishops Cleeve	0.00	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30
Co-op, Abbotswood Centre, Brockworth, Gloucester	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99
Co-op, Bath Road, Cheltenham	8.00	0.00	0.00	0.70	0.00	0.00	0.00	0.00	2.06	0.00	0.00	0.00	10.76
Co-op, Benhall Avenue, Cheltenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Cheltenham Road, Longlevens, Gloucester	0.00	0.00	0.00	0.00	5.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.96
Co-op, Edinburgh Place, Cheltenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Finlay Road, Gloucester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Gloucester Road, Lansdowne, Cheltenham	0.00	0.00	0.00	0.00	4.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.20
Co-op, Hesters Way, Cheltenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, High Street, Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.24	1.19	0.00	0.00	0.00	0.00	0.00	1.44
Co-op, High Street, Tredworth, Gloucester	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99
Co-op, Hillview Parade, Hucclecote, Gloucester	0.00	0.00	0.00	0.00	5.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.96
Co-op, Hucclecote Road, Gloucester	0.00	0.00	0.00	0.00	1.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.99
Co-op, Kingsholm Road, Gloucester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Leckhampton Road, Cheltenham	0.80	0.00	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.14
Co-op, London Road, Charlton Kings, Cheltenham	1.60	0.00	0.00	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.88
Co-op, Montpellier Road, Cheltenham	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.60
Co-op, North Street, Winchcombe	0.00	0.00	2.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.07
Co-op, Northway Lane, Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.24	2.99	0.00	0.00	0.00	0.00	0.00	3.23
Co-op, Seventh Avenue, Tuffley, Gloucester	0.00	0.00	0.00	0.00	2.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.10
Co-op, Seymour Road, Gloucester	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99
Co-op, Warden Hill, Cheltenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Windyridge Road, Cheltenham	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80
Co-op, Parton Road, Churchdown, Gloucester	0.00	0.00	0.00	0.00	4.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.97
Iceland, High Street, Cheltenham	2.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.50
Iceland, Oxboode, Gloucester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73	0.00	0.73
Lidl, Bristol Road, Gloucester	0.00	0.00	0.00	0.00	2.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.10
Lidl, Eastern Avenue, Gloucester	0.00	0.00	0.00	0.00	2.10	0.00	0.00	0.00	1.35	0.00	0.00	0.00	3.45
Lidl, Evesham Road, Bishops Cleeve	0.00	1.61	0.00	0.14	0.00	0.00	0.22	0.42	0.00	0.00	0.00	0.00	2.40
Lidl, Grosvenor Terrace, Cheltenham	0.80	0.00	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.23
M&S Simply Food, Kingsditch Retail Park, Cheltenham	3.30	0.45	0.00	0.35	0.00	0.00	1.49	0.00	0.00	0.00	0.00	0.00	5.59
M&S Simply Food, Ashchurch Road, Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Marks and Spencer, City Centre	0.00	0.00	0.00	0.00	6.19	0.00	0.00	0.00	0.00	0.00	0.00	0.21	6.40
Marks and Spencer, High Street, Cheltenham	3.30	0.00	0.00	0.49	0.00	0.00	0.22	0.00	0.00	0.00	0.36	0.00	4.38
Morrisons, Ashchurch Road, Tewkesbury	0.00	0.10	1.06	0.00	0.00	1.68	25.89	1.90	0.00	0.00	0.00	0.00	30.63
Morrisons, Glevum Shopping Centre, Gloucester	0.00	0.00	0.00	0.00	45.41	0.00	0.00	0.00	0.00	0.00	0.36	0.00	45.77
Morrisons, Caernarvon Road Cheltenham	39.53	0.45	0.43	5.73	2.10	0.00	0.00	0.95	1.35	0.47	0.00	0.00	51.01
Sainsbury, Barnett Way, Barnwood, Gloucester	0.00	0.00	0.43	0.14	45.97	0.49	0.00	0.00	0.00	0.00	0.36	0.00	47.40
Sainsbury, Bath Road, Cheltenham	3.30	0.10	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.62
Sainsbury, Gallagher Retail Park, Cheltenham	22.02	2.78	1.49	0.79	0.00	0.72	5.93	0.00	0.00	0.00	0.00	0.00	33.72
Sainsbury, Northgate Street, Gloucester	0.00	0.00	0.00	0.00	3.09	0.36	0.00	0.00	0.00	0.00	0.00	0.00	3.45
Sainsbury, Priors Road, Oakley, Cheltenham	32.52	0.55	1.92	1.28	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	36.39
Sainsbury, St Ann Way, Gloucester Quays, Gloucester	0.00	0.00	0.00	0.00	10.39	2.54	0.52	0.00	0.70	0.00	1.99	1.17	17.32
Somerfield, Tobysfield Road, Bishops Cleeve	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10
Tesco (Express), Eastern Avenue, Gloucester	0.00	0.00	0.00	0.00	0.99	0.24	0.00	0.00	0.00	0.00	0.36	0.48	2.08
Tesco (Express), Hewlett Road, Cheltenham	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	0.00	0.00	0.00	0.52
Tesco (Express), Lysons Avenue, Gloucester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco (Express), Mead Road, Gloucester	0.00	0.00	0.00	0.00	1.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.99
Tesco (Express), Longlevens, Gloucester	0.00	0.00	0.00	0.00	0.99	0.00	0.22	0.85	0.00	0.00	0.00	0.00	2.07
Tesco (Metro), Bishops Walk, Tewkesbury	8.51	0.00	0.00	0.00	0.00	0.11	4.99	0.00	0.00	0.00	0.00	0.00	13.61
Tesco (Metro), High Street, Cheltenham	14.31	0.10	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	14.64
Tesco, Bristol Road, Cheltenham	1.70	0.45	0.00	0.14	0.00	0.00	0.52	0.00	0.00	0.00	0.00	0.00	2.81
Tesco, Brockworth, Gloucester Business Park, Gloucester	4.20	0.00	0.00	0.43	22.98	0.73	0.22	0.00	0.00	0.00	0.36	0.00	28.94
Tesco, Church Road, Bishops Cleeve	11.01	16.48	1.92	0.00	0.00	0.00	1.04	0.00	0.00	0.00	0.00	0.00	30.44
Tesco, Colletts Drive, Cheltenham	17.71	0.67	1.72	1.15	0.00	0.24	0.74	0.00	0.00	0.00	0.36	0.00	22.60
Tesco, Quedgeley District Centre, Gloucester	0.00	0.00	0.00	0.00	34.14	0.00	0.00	0.00	5.42	0.00	1.09	0.48	41.13
Tesco, St Oswalds Road, Gloucester	0.00	0.00	0.00	0.00	21.77	7.28	2.23	0.00	0.00	0.00	2.53	0.00	33.80
Waitrose, Honeybourne Way, Cheltenham	13.41	0.98	0.86	2.80	0.00	0.24	1.56	0.00	0.00	0.00	0.00	0.00	19.84
Bath	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80
Birmingham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bishops Cleeve	0.00	1.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.74
Bristol	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	0.48
Cardiff	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.22
Cheltenham town centre	5.60	0.10	0.43	0.41	0.00	0.00	0.97	0.42	0.00	0.00	0.00	0.00	7.94
Chepstow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91	0.91
Cinderford	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.00	0.00	18.13	0.96	20.08
Cirencester	0.00	0.00	1.04	0.93	0.00	0.00	0.00	0.00	1.35	15.61	0.35	0.00	19.29
Coleford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35	10.82	11.17
Cribbs Causeway	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dursley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.29	0.00	0.00	0.00	10.29
Evesham	0.00	0.00	1.29	0.00	0.00	0.11	0.00	29.30	0.00	0.00	0.00	0.00	30.70
Gloucester city centre	0.00	0.00	0.20	0.00	2.98	0.00	0.00	0.00	0.00	0.00	0.72	0.00	3.90
Great Malvern	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.22
Hereford town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.48	0.84
Lydney	0.00	0.00	0.00	0.00	2.10	0.11	0.00	0.00	0.00	0.00	1.45	33.39	37.05
Malvern Link	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.74
Monmouth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.44	1.06	2.50
Nailsworth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.57	0.00	0.00	0.00	5.57
Newport	0.00	0.00	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.11
Oxford	0.00	0.00	0.20	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.27
Pershore	0.00	0.00	0.00	0.00	0.00	0.00	0.22	8.90	0.00	0.00	0.00	0.00	9.12
Ross on Wye	0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.00	0.00	0.00	6.31	1.92	8.60
Stow on the Wold	0.00	0.00	4.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.83
Stratford upon Avon	0.00	0.00	0.43	0.00	0.00	0.00	0.00	1.38	0.00	0.00	0.00	0.00	1.80
Stroud	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	81.33	0.00	0.00	0.00	81.33
Swindon town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tewkesbury	0.00	0.00	0.00	0.									

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 9 Existing foodstores

	Sales Floorspace sq. m	Conv Sales floorspace sq. m	Sales density £/sq m	Benchmark Turnover £m	Survey Derived Turnover £m	Difference £m
<b>Cheltenham</b>						
<i>Town Centre</i>						
Tesco Metro	824	742	13773	10.21	14.64	4.42
Lidl	1100	880	5100	4.49	1.23	-3.26
Iceland	445	401	5936	2.38	2.50	0.12
Marks & Spencer	500	475	11757	5.58	4.38	-1.21
<i>District Centres</i>						
Morrisons, Caernarvon Road	2954	2511	12302	30.89	51.01	20.12
Sainsbury, Bath Road	379	360	10678	3.84	3.62	-0.23
Co-op, Bath Road	375	356	7600	2.71	10.76	8.05
Coronation Square	622	591	6000	3.55	0.80	-2.75
<i>Stores Outside Town / District Centres</i>						
Sainsburys, Tewkesbury Road	5729	4010	10678	42.82	33.72	-9.10
Tesco, Colletts Drive	5749	4024	13773	55.43	22.60	-32.82
Waitrose, Honeybourne Way	2800	2800	13045	36.53	19.84	-16.68
Marks & Spencer, Kingsditch Retail Park	750	675	11757	7.94	5.59	-2.35
Aldi, Tewkesbury Road	960	768	5200	3.99	2.97	-1.02
Co-op, Windy Ridge Road	426	405	7600	3.08	0.80	-2.28
Co-op, Charlton Kings	300	285	7600	2.17	1.88	-0.29
Sainsburys, Prestbury	2365	2010	10678	21.47	36.39	14.92
Other Stores in Cheltenham				27.75	27.75	0.00
<b>Total Cheltenham</b>		<b>21293</b>		<b>264.81</b>	<b>240.48</b>	<b>-24.34</b>
<b>Gloucester</b>						
<i>City centre</i>						
Sainsbury Northgate	1397	1187	10678	12.68	3.45	-9.23
Marks and Spencer	400	380	11757	4.47	6.40	1.93
Iceland	850	765	5936	4.54	0.73	-3.82
Other city centre					3.90	3.90
<i>District Centres</i>						
Morrisons Abbeydale	1623	1380	12302	16.97	45.77	28.80
Tesco Quedgeley	2622	1835	13773	25.28	41.13	15.85
Aldi Quedgeley	933	746	5200	3.88	0.99	-2.89
<i>Stores Outside Town / District Centres</i>						
Asda, Bruton Way	3877	2714	15927	43.22	39.24	-3.98
Sainsbury, St Ann Way	3720	2604	10678	27.81	17.32	-10.49
Sainsbury, Barnett Way	4666	3266	10678	34.88	47.40	12.52
Tesco Brockworth		3350	13773	46.14	28.94	-17.20
Tesco St, Oswalds	3491	2444	13773	33.66	33.80	0.14
Gloucester Other				43.68	43.68	
<b>Total Gloucester</b>		<b>20672</b>		<b>297.21</b>	<b>312.75</b>	<b>15.54</b>
<b>Tewkesbury</b>						
Tesco - Town Centre	974	877	13773	12.07	13.61	1.54
Co-op High St	780	741	7600	5.63	1.44	-4.19
Other				3.48	3.48	0.00
<i>District centre</i>						
Co-op Northway	836	794	7600	6.04	3.23	-2.80
<i>Stores Outside Town / District Centres</i>						
Morrisons Ashchurch Rd	2323	1975	12302	24.29	30.63	6.34
<b>Tewkesbury Total</b>				<b>51.51</b>	<b>52.40</b>	<b>0.88</b>
<b>Bishops Cleeve</b>						
Other				2.14	2.14	0.00
Lidl	1132	906	5100	4.62	2.40	-2.22
Tesco	2106	1685	13773	23.20	30.44	7.24
<b>Bishops Cleeve Total</b>				<b>29.96</b>	<b>34.98</b>	<b>5.02</b>
<b>Winchcombe</b>						
Co-op	90	81	7600	0.62	2.07	1.46
Other				3.12	3.12	0.00
<b>Winchcombe Total</b>				<b>3.73</b>	<b>5.19</b>	<b>1.46</b>
mail order/internet					32.47	
Elsewhere Survey Area					482.69	
Out of Survey Area					60.10	
<b>Total</b>					<b>1866.84</b>	

Sources: Refer to main report text

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 10 Convenience Capacity - Cheltenham**

	2011	2016	2021	2026	2031
Total available expenditure in the Study Area £m	1241.27	1296.96	1371.57	1450.01	1525.44
Non-store sales (Special forms of trading) £m	7.45	51.88	82.29	101.50	106.78
%	0.006	0.04	0.06	0.07	0.07
Total available expenditure excl 50% of non-store sales £m	1233.82	1245.08	1289.27	1348.51	1418.66
Turnover of stores in Cheltenham £m	230.44	226.96	230.16	232.47	234.80
Market Share (of in-store sales)	20%	20%	20%	20%	20%
Turnover potential (£m)	244.46	246.69	255.44	267.18	281.08
Overtrading (£m)	-24.34	-24.34	-24.34	-24.34	-24.34
Expenditure capacity (£m)	-10.32	-4.61	0.95	10.38	21.94
Commitments:					
Morrisons Extension, Caernarvon Road	6.22	6.13	6.22	6.28	6.34
Asda, Hatherley Lane	35.49	34.96	35.45	35.81	36.17
Discount food, adjacent B&Q, Hatherley Lane	3.70	3.65	3.70	3.73	3.77
<b>Residual expenditure capacity (£m)</b>	<b>-55.74</b>	<b>-49.34</b>	<b>-44.41</b>	<b>-35.44</b>	<b>-24.34</b>
<b>Floorspace Requirement net sales @ £12000/sq. m</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Special Forms of Trading: Base NEMS Household Survey (June 2011), adjusted per Experian Retail Planner Note 9 (Sept 2011)

Forecast: Experian Retail Planner Note 9 (Sept 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 11 Convenience Capacity - Gloucester**

	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1241.27	1296.96	1371.57	1450.01	1525.44
Non-store sales (Special forms of trading) £m	7.45	51.88	82.29	101.50	106.78
%	0.006	0.04	0.06	0.07	0.07
Total available expenditure excl 50% of non-store sales £m	1233.82	1245.08	1289.27	1348.51	1418.66
Turnover of stores in Gloucester (£m)	299.70	295.17	299.33	302.33	305.37
Market Share (of in-store sales)	26%	26%	26%	26%	26%
Turnover potential (£m)	317.93	320.83	332.22	347.48	365.56
Overtrading (£m)	15.54	15.54	15.54	15.54	15.54
Expenditure capacity (£m)	33.77	41.20	48.43	60.69	75.74
Commitments:					
Tesco Quedgeley Extension	18.20	17.93	18.18	18.36	18.54
Kingsway Local Centre	4.53	4.46	4.52	4.57	4.61
Tesco Churchdown	9.89	9.75	9.88	9.98	10.08
<b>Residual expenditure capacity (£m)</b>	<b>1.15</b>	<b>9.07</b>	<b>15.85</b>	<b>27.78</b>	<b>42.50</b>
<b>Floorspace Requirement net sales @ £12000/sq. m</b>	<b>0</b>	<b>756</b>	<b>1321</b>	<b>2315</b>	<b>3541</b>

Special Forms of Trading: Base NEMS Household Survey (June 2011), adjusted per Experian Retail Planner Note 9 (Sept 2011)

Forecast: Experian Retail Planner Note 9 (Sept 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 12 Convenience Capacity - Tewkesbury**

	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1241.27	1296.96	1371.57	1450.01	1525.44
Non-store sales (Special forms of trading) £m	7.45	51.88	82.29	101.50	106.78
%	0.006	0.04	0.06	0.07	0.07
Total available expenditure excl 50% of non-store sales £m	1233.82	1245.08	1289.27	1348.51	1418.66
Turnover of stores in Tewkesbury (£m)	50.21	49.45	50.15	50.65	51.16
Market Share (of in-store sales)	4%	4%	4%	4%	4%
Turnover potential (£m)	53.26	53.75	55.66	58.22	61.24
Overtrading (£m)	0.88	0.88	0.88	0.88	0.88
Expenditure capacity (£m)	3.94	5.18	6.39	8.45	10.97
Commitments: Aldi, Gloucester Road	4.19	4.12	4.18	4.22	4.27
<b>Residual expenditure capacity (£m)</b>	<b>-0.25</b>	<b>1.06</b>	<b>2.21</b>	<b>4.22</b>	<b>6.70</b>
<b>Floorspace Requirement net sales @ £12000/sq. m</b>	<b>-21</b>	<b>88</b>	<b>184</b>	<b>352</b>	<b>558</b>

Special Forms of Trading: Base NEMS Household Survey (June 2011), adjusted per Experian Retail Planner Note 9 (Sept 2011)

Forecast: Experian Retail Planner Note 9 (Sept 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 13 Convenience Capacity - Bishops Cleeve**

	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1241.27	1296.96	1371.57	1450.01	1525.44
Non-store sales (Special forms of trading) £m	7.45	51.88	82.29	101.50	106.78
%	0.006	0.04	0.06	0.07	0.07
Total available expenditure excl 50% of non-store sales £m	1233.82	1245.08	1289.27	1348.51	1418.66
Turnover of stores in Bishops Cleeve (£m)	33.52	33.02	33.48	33.82	34.16
Market Share (of in-store sales)	3%	3%	3%	3%	3%
Turnover potential (£m)	35.56	35.89	37.16	38.87	40.89
Overtrading (£m)	5.02	5.02	5.02	5.02	5.02
Expenditure capacity (£m)	7.06	7.89	8.70	10.07	11.75
Commitments:					
<b>Residual expenditure capacity (£m)</b>	<b>7.06</b>	<b>7.89</b>	<b>8.70</b>	<b>10.07</b>	<b>11.75</b>
<b>Floorspace Requirement net sales @ £1200/sq. m</b>	<b>588</b>	<b>657</b>	<b>725</b>	<b>839</b>	<b>979</b>

Special Forms of Trading: Base NEMS Household Survey (June 2011), adjusted per Experian Retail Planner Note 9 (Sept 2011)

Forecast: Experian Retail Planner Note 9 (Sept 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 14 Convenience Capacity - Winchcombe**

	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1241.27	1296.96	1371.57	1450.01	1525.44
Non-store sales (Special forms of trading) £m	7.45	51.88	82.29	101.50	106.78
%	0.006	0.04	0.06	0.07	0.07
Total available expenditure excl 50% of non-store sales £m	1233.82	1245.08	1289.27	1348.51	1418.66
Turnover of stores in Winchcombe (£m)	4.97	4.90	4.97	5.02	5.07
Market Share (of in-store sales)	0.43%	0.43%	0.43%	0.43%	0.43%
Turnover potential (£m)	5.27	5.32	5.51	5.76	6.06
Overtrading (£m)	1.46	1.46	1.46	1.46	1.46
Expenditure capacity (£m)	1.76	1.88	2.00	2.21	2.45
Commitments:					
<b>Residual expenditure capacity (£m)</b>	<b>1.76</b>	<b>1.88</b>	<b>2.00</b>	<b>2.21</b>	<b>2.45</b>
<b>Floorspace Requirement net sales @ £12000/sq. m</b>	<b>147</b>	<b>157</b>	<b>167</b>	<b>184</b>	<b>205</b>

Special Forms of Trading: Base NEMS Household Survey (June 2011), adjusted per Experian Retail Planner Note 9 (Sept 2011)

Forecast: Experian Retail Planner Note 9 (Sept 2011)

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 15 Comparison Goods Survey Derived Turnover - clothing and footwear

Location	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zones 1-12	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m	
Cheltenham town centre	0.84	61.74	0.73	7.01	0.40	7.16	0.74	4.52	0.20	18.70	0.17	1.63	0.52	12.71	0.18	8.41	0.12	6.98	0.34	7.02	0.08	1.18	0.06	1.25		<b>137.13</b>
Cheltenham out of centre	0.04	3.25	0.01	0.10	0.03	0.57	0.01	0.06	0.01	1.04	0.03	0.31	0.04	1.08	0.01	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.21		<b>7.11</b>
Gloucester city centre	0.01	0.81	0.01	0.10	0.00	0.00	0.01	0.06	0.48	43.64	0.34	3.37	0.01	0.27	0.01	0.49	0.26	15.22	0.02	0.48	0.31	4.74	0.17	3.34		<b>67.81</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	4.16	0.00	0.00	0.00	0.00	0.00	0.00	0.02	1.27	0.00	0.00	0.03	0.51	0.01	0.21		<b>5.63</b>
Gloucester Quays	0.01	0.81	0.00	0.00	0.00	0.00	0.00	0.00	0.08	7.27	0.04	0.41	0.00	0.00	0.00	0.00	0.03	1.90	0.00	0.00	0.06	0.85	0.04	0.83		<b>12.08</b>
Gloucester Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	3.12	0.01	0.10	0.01	0.27	0.00	0.00	0.01	0.63	0.00	0.00	0.02	0.34	0.03	0.63		<b>4.75</b>
Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.20	0.22	5.41	0.04	1.98	0.00	0.00	0.00	0.00	0.01	0.17	0.00	0.00		<b>7.59</b>
Winchcombe	0.00	0.00	0.00	0.00	0.01	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.19</b>
Bishops Cleeve	0.00	0.00	0.10	0.91	0.01	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>1.37</b>
Elsewhere in Study Area	0.01	0.81	0.01	0.10	0.11	1.89	0.05	0.32	0.00	0.00	0.00	0.00	0.03	0.81	0.33	15.33	0.27	15.86	0.34	7.02	0.09	1.35	0.06	1.25		<b>43.39</b>
Internet/Mail Order	0.03	2.44	0.09	0.81	0.08	1.51	0.09	0.58	0.08	7.27	0.15	1.43	0.03	0.81	0.08	3.46	0.07	4.44	0.08	1.69	0.11	1.69	0.13	2.50		<b>26.96</b>
Elsewhere outside Study Area	0.04	3.25	0.05	0.51	0.36	6.41	0.09	0.58	0.07	6.23	0.24	2.35	0.12	2.97	0.34	15.83	0.22	13.32	0.22	4.60	0.29	4.40	0.49	9.81		<b>65.86</b>
<b>Total</b>	<b>1.00</b>	<b>73.11</b>	<b>1</b>	<b>9.55</b>	<b>1</b>	<b>17.91</b>	<b>1.00</b>	<b>6.14</b>	<b>1.00</b>	<b>91.44</b>	<b>1.00</b>	<b>9.81</b>	<b>1</b>	<b>24.60</b>	<b>1</b>	<b>45.99</b>	<b>1</b>	<b>59.63</b>	<b>1</b>	<b>20.82</b>	<b>1</b>	<b>15.23</b>	<b>1</b>	<b>20.03</b>		<b>379.03</b>

Source: Market Share % NEMS Household Survey (June 2011)

Table 5a



Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 16 Comparison Goods Survey Derived Turnover - DIY goods

Location	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zones 1-12	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m	
Cheltenham town centre	0.09	3.34	0.05	0.26	0.06	0.72	0.06	0.22	0.01	0.55	0.02	0.14	0.14	1.52	0.00	0.00	0.01	0.38	0.02	0.25	0.01	0.09	0.00	0.00		<b>7.48</b>
Cheltenham out of centre	0.89	32.17	0.79	4.01	0.30	3.36	0.80	3.12	0.05	2.21	0.08	0.48	0.44	4.92	0.01	0.19	0.04	1.50	0.10	1.14	0.01	0.09	0.00	0.00		<b>53.21</b>
Gloucester city centre	0.00	0.00	0.00	0.00	0.01	0.12	0.00	0.00	0.07	3.32	0.06	0.34	0.00	0.00	0.00	0.00	0.02	0.75	0.00	0.00	0.02	0.18	0.03	0.36		<b>5.08</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.09	0.00	0.00		<b>0.09</b>
Gloucester Quays	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.00</b>
Gloucester Other	0.00	0.00	0.00	0.00	0.01	0.12	0.03	0.13	0.85	39.87	0.56	3.43	0.07	0.82	0.00	0.00	0.18	6.00	0.03	0.38	0.53	4.66	0.34	3.89		<b>59.30</b>
Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.07	0.16	1.76	0.01	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>2.02</b>
Winchcombe	0.00	0.00	0.00	0.00	0.09	0.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.96</b>
Bishops Cleeve	0.00	0.00	0.14	0.71	0.00	0.00	0.01	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.76</b>
Elsewhere in Study Area	0.00	0.00	0.00	0.00	0.31	3.48	0.09	0.35	0.01	0.55	0.14	0.89	0.07	0.82	0.89	15.74	0.67	22.51	0.45	5.34	0.20	1.74	0.23	2.67		<b>54.09</b>
Internet/Mail Order	0.01	0.42	0.01	0.06	0.01	0.12	0.00	0.00	0.01	0.55	0.01	0.07	0.00	0.00	0.00	0.00	0.02	0.75	0.01	0.13	0.02	0.18	0.03	0.36		<b>2.65</b>
Elsewhere outside Study Area	0.01	0.42	0.00	0.00	0.21	2.40	0.01	0.04	0.00	0.00	0.12	0.75	0.13	1.41	0.09	1.55	0.06	1.88	0.39	4.58	0.20	1.74	0.36	4.13		<b>18.89</b>
<b>Total</b>	<b>1.00</b>	<b>36.34</b>	<b>1.00</b>	<b>5.05</b>	<b>1.00</b>	<b>11.28</b>	<b>1.00</b>	<b>3.91</b>	<b>1.00</b>	<b>47.06</b>	<b>1.00</b>	<b>6.17</b>	<b>1.00</b>	<b>11.26</b>	<b>1.00</b>	<b>17.68</b>	<b>1.00</b>	<b>33.76</b>	<b>1.00</b>	<b>11.82</b>	<b>1.00</b>	<b>8.77</b>	<b>1.00</b>	<b>11.41</b>		<b>204.53</b>

Source: Market Share % NEMS Household Survey (June 2011)

Table 5c

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 17 Comparison Goods Survey Derived Turnover - furniture and floorcoverings

Location	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zones 1-12	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m	
Cheltenham town centre	0.45	12.81	0.40	1.62	0.37	3.04	0.51	1.45	0.10	3.48	0.09	0.38	0.46	4.46	0.08	1.31	0.06	1.47	0.10	0.88	0.07	0.40	0.02	0.18		<b>31.50</b>
Cheltenham out of centre	0.35	9.82	0.41	1.68	0.07	0.61	0.28	0.79	0.05	1.99	0.04	0.19	0.16	1.57	0.05	0.88	0.04	0.88	0.04	0.33	0.05	0.32	0.01	0.09		<b>19.15</b>
Gloucester city centre	0.06	1.71	0.04	0.17	0.00	0.00	0.04	0.12	0.49	17.91	0.29	1.26	0.01	0.12	0.00	0.00	0.15	3.83	0.00	0.00	0.19	1.12	0.10	0.82		<b>27.07</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.29	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.29</b>
Gloucester Quays	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.00</b>
Gloucester Other	0.00	0.00	0.01	0.06	0.00	0.00	0.03	0.08	0.23	8.46	0.16	0.69	0.00	0.00	0.00	0.00	0.06	1.47	0.01	0.11	0.14	0.80	0.05	0.36		<b>12.04</b>
Tewkesbury	0.00	0.00	0.01	0.06	0.00	0.00	0.01	0.04	0.00	0.00	0.00	0.00	0.15	1.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>1.55</b>
Winchcombe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.00</b>
Bishops Cleeve	0.00	0.00	0.01	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.06</b>
Elsewhere in Study Area	0.00	0.00	0.01	0.06	0.31	2.53	0.03	0.08	0.04	1.49	0.24	1.01	0.05	0.48	0.61	10.72	0.49	12.09	0.43	3.74	0.16	0.96	0.43	3.36		<b>36.53</b>
Internet/Mail Order	0.06	1.71	0.04	0.17	0.09	0.71	0.04	0.12	0.03	1.00	0.06	0.25	0.05	0.48	0.04	0.66	0.01	0.29	0.04	0.33	0.11	0.64	0.07	0.54		<b>6.91</b>
Elsewhere outside Study Area	0.08	2.13	0.04	0.17	0.16	1.32	0.04	0.12	0.05	1.99	0.12	0.50	0.12	1.21	0.23	3.94	0.18	4.42	0.39	3.41	0.28	1.68	0.32	2.54		<b>23.44</b>
<b>Total</b>	<b>1.00</b>	<b>28.17</b>	<b>1.00</b>	<b>4.06</b>	<b>1.00</b>	<b>8.20</b>	<b>1.00</b>	<b>2.82</b>	<b>1.00</b>	<b>36.32</b>	<b>1.00</b>	<b>4.27</b>	<b>1.00</b>	<b>9.77</b>	<b>1.00</b>	<b>17.50</b>	<b>1.00</b>	<b>24.78</b>	<b>1.00</b>	<b>8.81</b>	<b>1.00</b>	<b>5.91</b>	<b>1.00</b>	<b>7.90</b>		<b>158.52</b>

Source: Market Share % NEMS Household Survey (June 2011)

Table 5f

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 18 Comparison Goods Survey Derived Turnover - large electrical goods

Location	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zones 1-12
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m
Cheltenham town centre	0.18	1.75	0.19	0.24	0.13	0.35	0.24	0.21	0.01	0.15	0.05	0.07	0.28	0.78	0.01	0.05	0.04	0.36	0.10	0.30	0.03	0.08	0.00	0.00	4.33
Cheltenham out of centre	0.60	5.87	0.64	0.84	0.16	0.43	0.43	0.37	0.00	0.00	0.07	0.10	0.27	0.75	0.09	0.38	0.00	0.00	0.03	0.10	0.03	0.08	0.00	0.00	8.92
Gloucester city centre	0.05	0.50	0.02	0.03	0.05	0.14	0.13	0.11	0.45	6.04	0.46	0.64	0.06	0.17	0.01	0.05	0.21	1.78	0.02	0.07	0.23	0.53	0.17	0.51	10.57
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gloucester Quays	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gloucester Other	0.01	0.12	0.00	0.00	0.00	0.00	0.02	0.02	0.42	5.59	0.20	0.28	0.02	0.06	0.00	0.00	0.15	1.24	0.00	0.00	0.27	0.64	0.21	0.65	8.60
Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.02	0.01	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05
Winchcombe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bishops Cleeve	0.00	0.00	0.04	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05
Elsewhere in Study Area	0.00	0.00	0.02	0.03	0.21	0.58	0.03	0.03	0.01	0.15	0.02	0.03	0.02	0.06	0.58	2.34	0.28	2.40	0.45	1.35	0.17	0.40	0.26	0.78	8.15
Internet/Mail Order	0.13	1.25	0.09	0.11	0.22	0.61	0.08	0.07	0.09	1.21	0.12	0.16	0.22	0.60	0.18	0.72	0.17	1.42	0.15	0.44	0.18	0.43	0.16	0.48	7.49
Elsewhere outside Study Area	0.03	0.25	0.00	0.00	0.22	0.61	0.07	0.06	0.01	0.15	0.06	0.08	0.11	0.29	0.13	0.52	0.16	1.33	0.24	0.71	0.08	0.19	0.20	0.61	4.80
<b>Total</b>	<b>1.00</b>	<b>9.74</b>	<b>1.00</b>	<b>1.31</b>	<b>1.00</b>	<b>2.72</b>	<b>1.00</b>	<b>0.87</b>	<b>1.00</b>	<b>13.29</b>	<b>1.00</b>	<b>1.38</b>	<b>1.00</b>	<b>2.73</b>	<b>1.00</b>	<b>4.05</b>	<b>1.00</b>	<b>8.53</b>	<b>1.00</b>	<b>2.98</b>	<b>1.00</b>	<b>2.34</b>	<b>1.00</b>	<b>3.02</b>	<b>52.97</b>

Source: Market Share % NEMS Household Survey (June 2011)

Table 5d

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 19 Comparison Goods Survey Derived Turnover - small electrical goods

Location	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zones 1-12	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m	
Cheltenham town centre	0.37	13.76	0.35	1.70	0.22	2.13	0.28	0.93	0.01	0.52	0.02	0.11	0.28	3.74	0.03	0.80	0.02	0.69	0.10	1.10	0.02	0.19	0.00	0.00		<b>25.67</b>
Cheltenham out of centre	0.49	18.06	0.46	2.28	0.13	1.22	0.48	1.59	0.00	0.00	0.05	0.23	0.21	2.77	0.09	2.13	0.00	0.00	0.01	0.12	0.02	0.19	0.00	0.00		<b>28.58</b>
Gloucester city centre	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.08	0.31	14.61	0.26	1.32	0.03	0.42	0.00	0.00	0.16	5.21	0.00	0.00	0.21	1.74	0.12	1.23		<b>24.60</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.52	0.01	0.06	0.00	0.00	0.00	0.00	0.01	0.35	0.00	0.00	0.00	0.00	0.01	0.11		<b>1.04</b>
Gloucester Quays	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.00</b>
Gloucester Other	0.02	0.86	0.00	0.00	0.00	0.00	0.02	0.08	0.46	21.92	0.30	1.49	0.03	0.42	0.00	0.00	0.12	3.82	0.00	0.00	0.30	2.42	0.16	1.68		<b>32.68</b>
Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	1.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.11		<b>1.77</b>
Winchcombe	0.00	0.00	0.00	0.00	0.02	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.34</b>
Bishops Cleeve	0.00	0.00	0.08	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.41</b>
Elsewhere in Study Area	0.00	0.00	0.00	0.00	0.26	2.54	0.08	0.27	0.01	0.52	0.06	0.29	0.01	0.14	0.56	14.09	0.35	11.11	0.65	7.06	0.19	1.55	0.21	2.24		<b>39.81</b>
Internet/Mail Order	0.08	3.01	0.11	0.53	0.15	1.42	0.09	0.31	0.13	6.26	0.20	1.03	0.19	2.49	0.17	4.25	0.18	5.55	0.10	1.10	0.15	1.26	0.20	2.13		<b>29.34</b>
Elsewhere outside Study Area	0.03	1.29	0.00	0.00	0.22	2.13	0.01	0.04	0.07	3.13	0.10	0.52	0.11	1.38	0.15	3.72	0.15	4.86	0.13	1.46	0.10	0.77	0.29	3.03		<b>22.34</b>
<b>Total</b>	<b>1.00</b>	<b>36.97</b>	<b>1.00</b>	<b>4.91</b>	<b>1.00</b>	<b>9.66</b>	<b>1.00</b>	<b>3.29</b>	<b>1.00</b>	<b>47.49</b>	<b>1.00</b>	<b>5.05</b>	<b>1.00</b>	<b>13.14</b>	<b>1.00</b>	<b>24.99</b>	<b>1.00</b>	<b>31.58</b>	<b>1.00</b>	<b>10.84</b>	<b>1.00</b>	<b>8.12</b>	<b>1.00</b>	<b>10.54</b>		<b>206.58</b>

Source: Market Share % NEMS Household Survey (June 2011)

Table 5e

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 20 Comparison Goods Survey Derived Turnover - other non-food goods

Location	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zones 1-12	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m	
Cheltenham town centre	0.65	86.62	0.58	10.50	0.27	10.49	0.61	7.89	0.18	30.82	0.12	2.45	0.31	13.76	0.16	13.03	0.02	2.63	0.12	4.98	0.06	1.90	0.03	1.09		<b>186.16</b>
Cheltenham out of centre	0.05	6.79	0.03	0.47	0.00	0.00	0.03	0.32	0.01	2.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>9.64</b>
Gloucester city centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	86.28	0.32	6.62	0.01	0.51	0.00	0.00	0.11	13.14	0.00	0.00	0.24	7.23	0.19	7.64		<b>121.42</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	2.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>2.05</b>
Gloucester Quays	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>0.00</b>
Gloucester Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	8.22	0.02	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	1.52	0.00	0.00		<b>10.23</b>
Tewkesbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	1.23	0.23	10.20	0.01	0.87	0.00	0.00	0.00	0.00	0.01	0.38	0.00	0.00		<b>12.67</b>
Winchcombe	0.00	0.00	0.01	0.23	0.02	0.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>1.04</b>
Bishops Cleeve	0.00	0.00	0.13	2.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<b>2.84</b>
Elsewhere in Study Area	0.00	0.00	0.01	0.23	0.17	6.46	0.14	1.77	0.00	0.00	0.06	1.23	0.01	0.51	0.42	33.87	0.38	44.69	0.60	24.91	0.08	2.28	0.19	7.64		<b>123.59</b>
Internet/Mail Order	0.30	40.76	0.23	4.20	0.28	10.90	0.19	2.42	0.24	41.09	0.33	6.87	0.34	15.29	0.20	15.63	0.38	44.69	0.22	9.06	0.39	11.79	0.32	12.55		<b>215.24</b>
Elsewhere outside Study Area	0.00	0.00	0.01	0.23	0.26	10.09	0.04	0.48	0.01	2.05	0.08	1.72	0.09	4.08	0.21	16.50	0.10	11.83	0.07	2.72	0.18	5.32	0.27	10.91		<b>65.94</b>
<b>Total</b>	<b>1.00</b>	<b>134.17</b>	<b>1.00</b>	<b>18.21</b>	<b>1.00</b>	<b>38.74</b>	<b>1.00</b>	<b>12.88</b>	<b>1.00</b>	<b>172.57</b>	<b>1.00</b>	<b>20.60</b>	<b>1.00</b>	<b>44.86</b>	<b>1.00</b>	<b>79.89</b>	<b>1.00</b>	<b>116.99</b>	<b>1.00</b>	<b>41.67</b>	<b>1.00</b>	<b>30.43</b>	<b>1.00</b>	<b>39.84</b>		<b>750.83</b>

Source: Market Share % NEMS Household Survey (June 2011)

Table 5b

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 21 Comparison Goods Survey Derived Turnover - non-bulky goods total £m

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
Cheltenham town centre	148.35	17.51	17.66	12.41	49.52	4.09	26.47	21.43	9.61	12.00	3.09	2.34	<b>324.48</b>
Cheltenham out of centre	10.04	0.57	0.57	0.39	3.09	0.31	1.08	0.49	0.00	0.00	0.00	0.21	<b>16.75</b>
Gloucester city centre	0.81	0.10	0.00	0.06	129.93	9.99	0.78	0.49	28.37	0.48	11.96	10.98	<b>193.97</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	6.21	0.00	0.00	0.00	1.27	0.00	0.51	0.21	<b>8.20</b>
Gloucester Quays	0.81	0.00	0.00	0.00	7.27	0.41	0.00	0.00	1.90	0.00	0.85	0.83	<b>12.08</b>
Gloucester Other	0.00	0.00	0.00	0.00	11.33	0.59	0.27	0.00	0.63	0.00	1.86	0.63	<b>15.32</b>
Tewkesbury	0.00	0.00	0.00	0.00	0.00	1.43	15.60	2.85	0.00	0.00	0.55	0.00	<b>20.43</b>
Winchcombe	0.00	0.23	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<b>1.23</b>
Bishops Cleeve	0.00	3.25	0.19	0.00	0.00	0.00	0.78	0.00	0.00	0.00	0.00	0.00	<b>4.22</b>
Elsewhere in Study Area	0.81	0.33	8.34	2.09	0.00	1.23	1.32	49.20	60.55	31.93	3.64	8.89	<b>168.34</b>
Internet/Mail Order	43.20	5.01	12.40	3.00	48.36	8.30	16.10	19.09	49.13	10.75	13.48	15.06	<b>243.89</b>
Elsewhere outside Study Area	3.25	0.74	16.50	1.06	8.29	4.07	7.05	32.32	25.15	7.32	9.72	20.72	<b>136.20</b>
<b>Total</b>	<b>207.28</b>	<b>27.75</b>	<b>56.65</b>	<b>19.02</b>	<b>264.01</b>	<b>30.41</b>	<b>69.46</b>	<b>125.88</b>	<b>176.61</b>	<b>62.49</b>	<b>45.65</b>	<b>59.87</b>	<b>1145.08</b>

Source: Table 15 + Table 20

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 22 Comparison Goods Survey Derived Turnover - bulky goods total £m

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
Cheltenham town centre	31.65	3.82	6.24	2.81	4.71	0.69	10.50	2.16	2.90	2.54	0.76	0.18	<b>68.97</b>
Cheltenham out of centre	65.91	8.82	5.62	5.86	4.21	1.00	10.01	3.58	2.39	1.70	0.68	0.09	<b>109.86</b>
Gloucester city centre	2.21	0.21	0.26	0.31	41.89	3.56	0.71	0.05	11.57	0.07	3.57	2.92	<b>67.32</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	0.52	0.06	0.00	0.00	0.64	0.00	0.09	0.11	<b>1.42</b>
Gloucester Quays	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<b>0.00</b>
Gloucester Other	0.98	0.06	0.12	0.31	75.83	5.89	1.29	0.00	12.54	0.49	8.51	6.58	<b>112.61</b>
Tewkesbury	0.00	0.06	0.00	0.04	0.00	0.09	4.90	0.19	0.00	0.00	0.00	0.11	<b>5.39</b>
Winchcombe	0.00	0.00	1.16	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	<b>1.30</b>
Bishops Cleeve	0.00	1.23	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<b>1.27</b>
Elsewhere in Study Area	0.00	0.09	9.13	0.73	2.72	2.22	1.50	42.89	48.11	17.50	4.64	9.06	<b>138.58</b>
Internet/Mail Order	6.38	0.88	2.86	0.50	9.02	1.52	3.58	5.63	8.02	1.99	2.50	3.51	<b>46.40</b>
Elsewhere outside Study Area	4.09	0.17	6.46	0.27	5.27	1.86	4.28	9.74	12.49	10.16	4.37	10.31	<b>69.48</b>
<b>Total</b>	<b>111.23</b>	<b>15.33</b>	<b>31.86</b>	<b>10.88</b>	<b>144.16</b>	<b>16.87</b>	<b>36.91</b>	<b>64.23</b>	<b>98.65</b>	<b>34.45</b>	<b>25.14</b>	<b>32.88</b>	<b>622.60</b>

Source: Tables 16 + 17 + 18 + 19

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 23 Comparison Goods Survey Derived Turnover - total £m

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
Cheltenham town centre	180.01	21.33	23.90	15.22	54.23	4.78	36.97	23.59	12.51	14.54	3.85	2.53	<b>393.45</b>
Cheltenham out of centre	75.95	9.39	6.19	6.25	7.30	1.30	11.09	4.07	2.39	1.70	0.68	0.30	<b>126.60</b>
Gloucester city centre	3.02	0.31	0.26	0.38	171.81	13.55	1.49	0.54	39.94	0.55	15.54	13.90	<b>261.29</b>
Gloucester Quedgeley	0.00	0.00	0.00	0.00	6.73	0.06	0.00	0.00	1.91	0.00	0.60	0.32	<b>9.62</b>
Gloucester Quays	0.81	0.00	0.00	0.00	7.27	0.41	0.00	0.00	1.90	0.00	0.85	0.83	<b>12.08</b>
Gloucester Other	0.98	0.06	0.12	0.31	87.16	6.48	1.56	0.00	13.17	0.49	10.37	7.20	<b>127.93</b>
Tewkesbury	0.00	0.06	0.00	0.04	0.00	1.52	20.50	3.04	0.00	0.00	0.55	0.11	<b>25.82</b>
Winchcombe	0.00	0.23	2.16	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	<b>2.53</b>
Bishops Cleeve	0.00	4.48	0.19	0.04	0.00	0.00	0.78	0.00	0.00	0.00	0.00	0.00	<b>5.49</b>
Elsewhere in Study Area	0.81	0.43	17.47	2.83	2.72	3.44	2.82	92.08	108.66	49.43	8.28	17.95	<b>306.92</b>
Internet/Mail Order	49.58	5.89	15.26	3.50	57.38	9.81	19.68	24.72	57.15	12.75	15.99	18.57	<b>290.28</b>
Elsewhere outside Study Area	7.34	0.92	22.96	1.33	13.56	5.92	11.34	42.06	37.64	17.48	14.09	31.03	<b>205.68</b>
<b>Total</b>	<b>318.51</b>	<b>43.09</b>	<b>88.51</b>	<b>29.90</b>	<b>408.17</b>	<b>47.28</b>	<b>106.37</b>	<b>190.11</b>	<b>275.27</b>	<b>96.94</b>	<b>70.79</b>	<b>92.75</b>	<b>1767.68</b>

Source: Table 21 + 22



Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 24 Comparison Goods Capacity - Cheltenham

Non-Bulky Goods	2011	2016	2021	2026	2031	Bulky Goods	2011	2016	2021	2026	2031
Total available expenditure in the Study Area £m	1285.8	1498.6	1786.6	2124.9	2515.0	Total available expenditure in the Study Area (£m)	658.8	767.9	915.4	1088.8	1288.6
Non-store sales (Special forms of trading) £m	154.3	179.8	214.4	255.0	301.8	Non-store sales (Special forms of trading) £m	29.6	34.6	41.2	49.0	58.0
%	0.120	0.120	0.120	0.120	0.120	%	0.045	0.045	0.045	0.045	0.045
Total available expenditure excl 75% of non-store sales £m	1131.5	1318.8	1572.2	1869.9	2213.2	Total available expenditure excl 75% of non-store sales £m	629.2	733.4	874.3	1039.8	1230.7
Turnover of stores in Cheltenham (£m)	331.9	357.1	388.5	422.7	459.9	Turnover of stores in Cheltenham (£m)	177.4	190.9	207.7	226.0	245.8
Market Share (of in-store sales)	32.5%	32.5%	32.5%	32.5%	32.5%	Market Share (of in-store sales)	31.3%	31.3%	31.3%	31.3%	31.3%
Turnover potential (£m)	368.0	428.9	511.3	608.2	719.8	Turnover potential (£m)	196.7	229.3	273.3	325.1	384.8
Expenditure capacity (£m)	36.1	71.8	122.8	185.5	259.9	Expenditure capacity (£m)	19.3	38.4	65.6	99.1	138.9
Commitments Turnover	17.23	18.43	20.05	21.81	23.73	Commitments Turnover	6.93	6.87	7.40	8.05	8.76
<b>Residual expenditure capacity (£m)</b>	<b>18.9</b>	<b>53.4</b>	<b>102.7</b>	<b>163.7</b>	<b>236.2</b>	<b>Residual expenditure capacity (£m)</b>	<b>12.4</b>	<b>31.5</b>	<b>58.3</b>	<b>91.1</b>	<b>130.2</b>
<b>Floorspace requirement sq. m net sales @ £5000/sq. m</b>	<b>3784</b>	<b>10673</b>	<b>20550</b>	<b>32732</b>	<b>47244</b>	<b>Floorspace requirement sq. m net sales @ £2000/sq. m</b>	<b>6198</b>	<b>15755</b>	<b>29125</b>	<b>45548</b>	<b>65096</b>
<b>Combined Comparison Goods</b>											
<b>Floorspace Capacity sq. m net sales</b>	<b>9982</b>	<b>26428</b>	<b>49675</b>	<b>78280</b>	<b>112339</b>						

Non Store Sales (SFT) Base year NEMS household survey (June 2011) adjusted as per Experian Retail Planner Briefing Note 9 (Sept 2011)  
 Non Food Sales (SFT) Forecast as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 25 Comparison Goods Capacity - Gloucester

Non-Bulky Goods	2011	2016	2021	2026	2031	Bulky Goods	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1285.8	1498.6	1786.6	2124.9	2515.0	Total available expenditure in the Study Area (£m)	658.8	767.9	915.4	1088.8	1288.6
Non-store sales (Special forms of trading) £m	154.3	179.8	214.4	255.0	301.8	Non-store sales (Special forms of trading) £m	29.6	34.6	41.2	49.0	58.0
%	0.120	0.120	0.120	0.120	0.120	%	0.045	0.045	0.045	0.045	0.045
Total available expenditure excl 75% of non-store sales £m	1131.5	1318.8	1572.2	1869.9	2213.2	Total available expenditure excl 75% of non-store sales £m	629.2	733.4	874.3	1039.8	1230.7
Turnover of stores in Gloucester (£m)	227.7	245.1	266.6	290.1	315.6	Turnover of stores in Gloucester (£m)	179.9	193.6	210.6	229.2	249.3
Market Share (of in-store sales)	22.3%	22.3%	22.3%	22.3%	22.3%	Market Share (of in-store sales)	31.7%	31.7%	31.7%	31.7%	31.7%
Turnover potential (£m)	252.5	294.3	350.9	417.3	494.0	Turnover potential (£m)	199.5	232.5	277.2	329.7	390.2
Expenditure capacity (£m)	24.8	49.3	84.3	127.3	178.4	Expenditure capacity (£m)	19.6	38.9	66.6	100.5	140.9
Commitments Turnover	11.02	11.86	12.90	14.04	15.27	Commitments Turnover	0	0.00	0.00	0.00	0.00
<b>Residual expenditure capacity (£m)</b>	<b>13.8</b>	<b>37.4</b>	<b>71.4</b>	<b>113.2</b>	<b>163.1</b>	<b>Residual expenditure capacity (£m)</b>	<b>19.6</b>	<b>38.9</b>	<b>66.6</b>	<b>100.5</b>	<b>140.9</b>
Floorspace requirement sq. m net sales @ £5000/sq. m	2757	7481	14273	22648	32622	Floorspace requirement sq. m net sales @ £2000/sq. m	9800	19464	33289	50275	70458
<b>Combined Comparison Goods</b>											
<b>Floorspace Capacity sq. m net sales</b>	<b>12557</b>	<b>26945</b>	<b>47562</b>	<b>72922</b>	<b>103080</b>						

Non Store Sales (SFT) Base year NEMS household survey (June 2011) adjusted as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Non Food Sales (SFT) Forecast as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 26 Comparison Goods Capacity - Tewkesbury

Non-Bulky Goods	2011	2016	2021	2026	2031	Bulky Goods	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1285.8	1498.6	1786.6	2124.9	2515.0	Total available expenditure in the Study Area (£m)	658.8	767.9	915.4	1088.8	1288.6
Non-store sales (Special forms of trading) £m	150.4	175.3	209.0	248.6	294.3	Non-store sales (Special forms of trading) £m	29.6	34.6	41.2	49.0	58.0
%	0.117	0.117	0.117	0.117	0.117	%	0.045	0.045	0.045	0.045	0.045
Total available expenditure excl 75% of non-store sales £m	1135.3	1323.3	1577.5	1876.3	2220.8	Total available expenditure excl 75% of non-store sales £m	629.2	733.4	874.3	1039.8	1230.7
Turnover of stores in Tewkesbury (£m)	20.3	21.8	23.7	25.8	28.1	Turnover of stores in Tewkesbury (£m)	5.3	5.8	6.4	7.0	7.6
Market Share (of in-store sales)	2.0%	2.0%	2.0%	2.0%	2.0%	Market Share (of in-store sales)	1.0%	1.0%	1.0%	1.0%	1.0%
Turnover potential (£m)	22.5	26.2	31.2	37.1	44.0	Turnover potential (£m)	6.4	7.5	8.9	10.6	12.5
Expenditure capacity (£m)	2.2	4.4	7.5	11.3	15.9	Expenditure capacity (£m)	1.1	1.7	2.5	3.6	5.0
Commitments Turnover	1.09	1.17	1.28	1.39	1.51	Commitments Turnover	0	0.00	0.00	0.00	0.00
<b>Residual expenditure capacity (£m)</b>	<b>1.1</b>	<b>3.2</b>	<b>6.2</b>	<b>9.9</b>	<b>14.4</b>	<b>Residual expenditure capacity (£m)</b>	<b>1.1</b>	<b>1.7</b>	<b>2.5</b>	<b>3.6</b>	<b>5.0</b>
Floorspace requirement sq m net sales @ £5000/sq. m	224	642	1245	1988	2873	Floorspace requirement sq. m net sales @ £2000/sq. m	533	860	1252	1813	2479
<b>Combined Comparison Goods</b>											
<b>Floorspace Capacity sq. m net sales</b>	<b>756</b>	<b>1502</b>	<b>2496</b>	<b>3801</b>	<b>5352</b>						

Non Store Sales (SFT) Base year NEMS household survey (June 2011) adjusted as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Non Food Sales (SFT) Forecast as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 27 Comparison Goods Capacity -Winchcombe

Non-Bulky Goods	2011	2016	2021	2026	2031	Bulky Goods	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1285.8	1498.6	1786.6	2124.9	2515.0	Total available expenditure in the Study Area (£m)	658.8	767.9	915.4	1088.8	1288.6
Non-store sales (Special forms of trading) £m	154.3	179.8	214.4	255.0	301.8	Non-store sales (Special forms of trading) £m	29.6	34.6	41.2	49.0	58.0
%	0.120	0.120	0.120	0.120	0.120	%	0.045	0.045	0.045	0.045	0.045
Total available expenditure excl 75% of non-store sales £m	1131.5	1318.8	1572.2	1869.9	2213.2	Total available expenditure excl 75% of non-store sales £m	629.2	733.4	874.3	1039.8	1230.7
Turnover of stores in Winchcombe (£m)	1.1	1.2	1.3	1.4	1.6	Turnover of stores in Winchcombe (£m)	1.3	1.4	1.5	1.6	1.8
Market Share (of in-store sales)	0.1%	0.1%	0.1%	0.1%	0.1%	Market Share (of in-store sales)	0.2%	0.2%	0.2%	0.2%	0.2%
Turnover potential (£m)	1.4	1.6	1.9	2.2	2.6	Turnover potential (£m)	1.4	1.7	2.0	2.4	2.8
Expenditure capacity (£m)	0.2	0.4	0.6	0.8	1.1	Expenditure capacity (£m)	0.1	0.3	0.5	0.7	1.0
Commitments Turnover	0	0.00	0.00	0.00	0.00	Commitments Turnover	0	0.00	0.00	0.00	0.00
<b>Residual expenditure capacity (£m)</b>	<b>0.2</b>	<b>0.4</b>	<b>0.6</b>	<b>0.8</b>	<b>1.1</b>	<b>Residual expenditure capacity (£m)</b>	<b>0.1</b>	<b>0.3</b>	<b>0.5</b>	<b>0.7</b>	<b>1.0</b>
Floorspace requirement sq. m net sales @ £5000/sq m	44	71	111	158	215	Floorspace requirement sq. m net sales @ £2000/sq. m	70	151	251	374	520
<b>Combined Comparison Goods</b>											
<b>Floorspace Capacity sq. m net sales</b>	<b>114</b>	<b>222</b>	<b>361</b>	<b>532</b>	<b>735</b>						

Non Store Sales (SFT) Base year NEMS household survey (June 2011) adjusted as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Non Food Sales (SFT) Forecast as per Experian Retail Planner Briefing Note 9 (Sept 2011)

Gloucester, Cheltenham and Tewkesbury JCS Retail Study

Table 28 Comparison Goods Capacity - Bishops Cleeve

Non-Bulky Goods	2011	2016	2021	2026	2031		Bulky Goods	2011	2016	2021	2026	2031
Total available expenditure in the Study Area (£m)	1285.8	1498.6	1786.6	2124.9	2515.0		Total available expenditure in the Study Area (£m)	658.8	767.9	915.4	1088.8	1288.6
Non-store sales (Special forms of trading) £m	154.3	179.8	214.4	255.0	301.8		Non-store sales (Special forms of trading) £m	29.6	34.6	41.2	49.0	58.0
%	0.120	0.120	0.120	0.120	0.120		%	0.045	0.045	0.045	0.045	0.045
Total available expenditure excl 75% of non-store sales £m	1131.5	1318.8	1572.2	1869.9	2213.2		Total available expenditure excl 75% of non-store sales £m	629.2	733.4	874.3	1039.8	1230.7
Turnover of stores in Bishops Cleeve (£m)	4.2	4.5	4.9	5.3	5.8		Turnover of stores in Bishops Cleeve (£m)	1.3	1.4	1.5	1.6	1.8
Market Share (of in-store sales)	0.4%	0.4%	0.4%	0.4%	0.4%		Market Share (of in-store sales)	0.2%	0.2%	0.2%	0.2%	0.2%
Turnover potential (£m)	4.6	5.4	6.4	7.7	9.1		Turnover potential (£m)	1.4	1.7	2.0	2.4	2.8
Expenditure capacity (£m)	0.5	0.9	1.5	2.3	3.3		Expenditure capacity (£m)	0.1	0.3	0.5	0.7	1.0
Commitments Turnover	0	0.00	0.00	0.00	0.00		Commitments Turnover	0	0.00	0.00	0.00	0.00
<b>Residual expenditure capacity (£m)</b>	<b>0.5</b>	<b>0.9</b>	<b>1.5</b>	<b>2.3</b>	<b>3.3</b>		<b>Residual expenditure capacity (£m)</b>	<b>0.1</b>	<b>0.3</b>	<b>0.5</b>	<b>0.7</b>	<b>1.0</b>
Floorspace requirement sq m net sales @£5,000/sq m	91	181	310	468	655		Floorspace requirement sq. m net sales @£2,000/sq m	70	140	239	361	506
<b>Combined Comparison Goods</b>												
<b>Floorspace Capacity sq. m net sales</b>	<b>161</b>	<b>321</b>	<b>549</b>	<b>828</b>	<b>1161</b>							

Non Store Sales (SFT) Base year NEMS household survey (June 2011) adjusted as per Experian Retail Planner Briefing Note 9 (Sept 2011)  
 Non Food Sales (SFT) Forecast as per Experian Retail Planner Briefing Note 9 (Sept 2011)

**Gloucester, Cheltenham and Tewkesbury JCS Retail Study**

**Table 29 Summary Table - Floorspace Capacity (sq. m net sales)**

Town	Convenience					Comparison				
	2011	2016	2021	2026	2031	2011	2016	2021	2026	2031
Cheltenham	0	0	0	0	0	9982	26428	49675	78280	112339
Gloucester	0	756	1321	2315	3541	12557	26945	47562	72922	103080
Tewkesbury	0	88	184	352	558	756	1502	2496	3801	5352
Winchcombe	147	157	167	184	205	114	222	361	532	735
Bishops Cleeve	588	657	725	839	979	161	321	549	828	1161

Source: Convenience Goods (Tables 10 - 14)

Comparison Goods (Tables 24 - 28)