FOREST OF DEAN DISTRICT COUNCIL

Forest of Dean District Retail Study

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1. INTRODUCTION

Overview

1.1 This report has been prepared by GVA Grimley Ltd in response to an instruction by Forest of Dean District Council (FODDC), dated October 2007, to prepare a Retail Study for the Forest of Dean administrative area. This study will provide essential background information to assist FODDC in the production of a Local Development Framework (LDF).

1.2 National planning policy guidance requires that local planning authorities' policies and proposals in a LDF should be founded on a thorough, clear and up-to-date understanding of the needs of their area and the opportunities and constraints which operate within that area. PPS12 (2008) requires local planning authorities to prepare and maintain an up-to-date evidence base and this retail study will form an integral part of FODDC's information library. It is intended that this study will meet these requirements by providing comprehensive survey material, in response to guidance within the ODPM publication '*Local Development Framework Monitoring: A Good Practice Guide*' (March 2005). This guidance requires local planning authorities to examine: the availability and use of existing centres, the accessibility of centres, retail expenditure patterns and proposals in adjacent areas. These actions will assist the Council to move forwards in the preparation of its LDF.

Objectives of the Study

1.3 The key issues for the study, identified by FODDC's study brief in September 2007, are as follows:

- The need for additional retail space in the town centres.
- The adequacy of the existing space (in terms of size, type and quality of units).
- The physical quality of the centres (public spaces, parking, fabric generally).
- Pedestrian environment and linkages (access and attractiveness)
- Review of current allocated retail sites.
- Review of the appropriateness of the existing defined boundary of each of the town centres
- The allocation of some of the core/peripheral areas within the boundaries (appropriate uses and mix of uses).
- Out-of-centre retailing.

1.4 In order to address all of the above issues, FODDC requires a comprehensive analysis of retailing in the Forest of Dean that addresses both quantitative and qualitative issues. FODDC requires that this study considers retail issues in a holistic manner, taking account of underlying patterns of sustainability, social inclusion and technological change. Accordingly, this study includes the following key components:

- Provision of a policy analysis, based on the contents of Planning Policy Statement 6: Planning for Town Centres (2005) plus policies at the regional and local level. At the local level, the Gloucestershire Structure Plan provides current strategic context for retailing in the Forest of Dean, supplemented by policies set out in the recently adopted Forest of Dean Local Plan Review. This study will facilitate a review of the robustness of shopping policies and proposals in the Local Plan, to inform the policy formulation in the LDF and other Council policy documents.
- Overview of the retail hierarchy in the Forest of Dean, focusing on a review of the vitality and viability of the four town centres (Coleford, Cinderford, Lydney and Newent). The assessment examines the retail performance of each centre.
- Following the assessment of town centre health and future retail floorspace capacity, this study also provides a review of potential shopping development opportunities in each of the four town centres. This work will examine existing allocations/opportunities identified in the adopted Local Plan, plus new potential opportunities which have been identified through the course of completing this study.
- Following the completion of each of the above tasks, a set of concise conclusions and a retail strategy for the Forest of Dean District is provided. This will focus on the retail hierarchy and the likely future role of each main centre, town centre improvements and retail development/investment/regeneration opportunities.

1.5 A key contributor to all of the above tasks has been empirical research in the form of a household telephone survey originally commissioned by FODDC and GVA Grimley for the assessment of a Tesco proposal for Cinderford, although the survey was structured to inform District-wide Local Development Framework work (such as this retail study). The survey interviewed 800 people across a wide geographic area, based on postcode sector areas, within the Forest of Dean District administrative area plus adjoining local authority boundaries. A plan of the survey area is contained at Appendix A of this report. The survey, the parameters of which are explained in greater detail in Sections 4 and 5 of this report, has established shopping habits of households for different types of food and non-food goods and has, in turn, contributed towards the detailed assessment of need for additional retail floorspace. The survey has also been structured to ascertain customer profiles, mode of travel to shopping destinations, plus a number of attitudinal questions determining what users think about the various town centres, and potential improvements to these centres. A full copy of the household survey tabulations is contained at Appendix B.

Structure of the Report

1.6 The remainder of this report is structured as follows:

- **Section 2** of this report provides a brief review of current national planning policy guidance, plus retail policies contained within Regional Planning Guidance for the South West (RPG10), the draft Regional Spatial Strategy and the Gloucestershire Structure Plan. This section also summarises the current local planning policy context outlined in the adopted Forest of Dean Local Plan Review.
- **Section 3** of this report analyses national retail trends. This includes a look back at recent historic trends, plus examination of likely future trends at the national level.
- **Section 4** provides an assessment of the retail hierarchy within the Forest of Dean and the surrounding area, concentrating on the health of the four key centres in the District (Lydney, Coleford, Cinderford and Newent), monitoring the performance of relevant indicators as set out in national planning policy guidance. This section also provides an overview of out-of-centre retail provision within the District and retail provision in the sub-region.
- **Section 5** sets out an assessment of future need for additional retail floorspace provision in the Forest of Dean over the lifetime of the Local Development Framework (up to 2026). It examines both quantitative and qualitative considerations of retail need and expresses estimates of need for each of the key towns.
- Drawing upon the findings of preceding chapters, **Section 6** outlines the broad policy options for the Forest of Dean Local Development Framework, examining future trends for floorspace capacity and an assessment of potential town centre development sites.
- **Section 7** provides a summary of the main findings of the study and provides an outline of the retail strategy for the Forest of Dean District.

1.7 All plans, statistical tables and other documents referred to in the text of this study are contained in appendices at the rear of this document.

2. POLICY OVERVIEW

Overview

2.1 This chapter outlines the salient planning policy context for retailing and town centres at the national, regional, strategic and local level. In particular, it outlines national planning policy in Planning Policy Statement 6: Planning for Town Centres (2005) and its approach to protecting and enhancing town centres, plus the assessment of the need for additional retail provision. At the regional level, we summarise the contents of Regional Planning Policy Guidance for the South West (RPG10) and the emerging South West Regional Spatial Strategy. The retailing and town centres policies in the Gloucestershire Structure Plan are also summarised, along with a review of the policies within the shopping chapter of the adopted Forest of Dean Local Plan Review.

National Retail Planning Policy

2.2 In March 2005, the Government published Planning Policy Statement 6: Planning for Town Centres, which supersedes PPG6 originally published in 1996. Many of the policies in PPS6 reproduce, or are closely based on, existing policies in PPG6, as clarified by a series of Ministerial statements between 1999 and 2003. Having regard to the main purpose of this report, Section 2 of PPS6, dealing with the plan-led approach, is of most relevance. It notes that local planning authorities should actively promote growth and manage change in town centres, define a network and hierarchy of centres each performing their appropriate role to meet the needs of their catchments, and adopt a pro-active plan-led approach to planning for town centres.

2.3 In relation to the preparation of development plan documents, PPS6 advises LPAs to actively plan for growth and manage change by:

- Selecting appropriate existing centres to accommodate the identified need for growth by:
    1) Making better use of existing land and buildings, including, where appropriate, redevelopment;
    2) Where necessary, extending the centre.
- Managing the role and function of existing centres; and
- Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.

2.4 Paragraph 2.16 of PPS6 provides a useful checklist of tasks to be considered by a local planning authority when preparing the evidence base for its Development Plan Documents:

- assess the need for new floorspace for retail, leisure and other key town centre uses, taking account of both quantitative and qualitative factors;
- identify deficiencies or gaps in provision, assess the capacity of existing centres to accommodate new development, including the scope for extending the town centre, and identify centres where change needs to be managed;
- identify the centres within their area where development will be focused, as well as the need for any new centres in areas of local importance, and develop strategies for developing and strengthening centres within their area;
- define the extent of the primary shopping area and the town centre, for the centres in their area on their Proposals Map;
- identify and allocate sites following analysis of a suite of key considerations;
- review of existing allocations and reallocate sites which do not comply with their policy statement;
- develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities; and
- set out criteria-based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.

2.5 The findings of this study aim to provide Forest of Dean District Council with a considered response to a number of these tasks, and will enable further work to be undertaken by the Council in relation to its Core Strategy and site specific allocations. In order to complete the above tasks, paragraph 2.23 of PPS6 sets out a suite of key considerations for local authorities:

a) Assess the need for development
b) Secure the appropriate scale of development
c) Apply the sequential approach to site selection
d) Assess the impact of development on existing centres; and
e) Ensure that locations are accessible.

2.6 This study aims to provide a comprehensive response to part (a) and also comment on part (b) insofar as it relates to the role of individual centres and the potential of specific town centre sites. An analysis of area (c) is also dealt with in this report, including consideration of existing Local Plan allocations and their relationship to parts (a) and (b). Part (d) is also considered when considering the options for the retail strategy to be adopted in the Forest of Dean District and within each of the centres. PPS6 guidance on each of these issues is explained in more detail in the appropriate sections of this document.

2.7 In May 2007, the Government outlined a series of major planning reforms in a Planning White Paper. Part of the proposals within the White Paper outlined improvements to the effectiveness of town centre planning policies. Section 7 of the White Paper notes that

> *"it is essential that local authorities have robust, evidence-based plans and strategies that are up to date and which set out a clear and proactive vision for town centres, based on a sound understanding of both the need and demand for new facilities. Where development outside the town centre would not impact detrimentally on the town centre, and it is otherwise acceptable in planning terms, both plans and planning decisions should reflect this".*

2.8 The White Paper goes on to note that the current 'need test' has proved in some respects to be a blunt instrument and can have the unintended effect of restricting competition and limiting consumer choice. For example, it is possible under current policy for a new retail development on the edge of the town centre to be refused because there is an existing or proposed out-of-town development which meets the identified need even though the new retail development would bring wider benefits and help support the town centre.

2.9 Alongside these potential changes, the Competition Commission ('CC') has conducted an inquiry into the UK grocery retail sector. One of the recommendations of the CC published in April 2008 is to introduce a 'competition test' when determining planning applications where the grocery store has, or after the proposed scheme has been implemented will have, a net sales area in excess of 1,000 sq metres. Applications would pass the test if within a 10-minute drive-time of the developed store:

(i) the grocery retailer that would operate the store was a new entrant in the local area; or

(ii) the total number of fascias (including any of the full-range national or regional grocery retailers and symbol groups) operating larger grocery retail stores in the local area were four or more; or

(iii) the total number of fascias were three or fewer and the grocery retailer operating the developed store would operate less than 60 per cent of groceries sales area (including the new or extended store).

2.10 Following the White Paper, in July 2008, the Government published a consultation document on proposed changes to PPS6. As this is a consultation document, it has very limited (or no) weight and it is expected that the revised version of PPS6 will be published in early 2009.

2.11 One of the key aims of the proposed changes, the Government says, is to protect local retailers which may struggle in the current economic climate, and in the face of competition from internet sales and the global marketplace.

2.12 The revised policy will remove the current 'need test' from planning applications for new retail development outside town centres, which the Government considers has unintentionally stifled diversity and consumer choice, and led to some new retail scheme on the edge of town centres being refused planning permission despite the fact such scheme could improve the vitality and viability of the centre. Instead there is a new 'impact test' which is aimed at providing councils with a better tool to prevent large scale developments putting small shops and town centres at risk. The new test includes assessing social, economic and environmental criteria including: retail diversity and consumer choice; loss of trade; impact on town centre investment; impact on sustainable development and climate change; scope for regeneration; and job creation.

2.13 The new document carries forward the thrust of current policy by requiring local authorities to take a pro active approach to planning for their town centre and to provide sustainable economic growth through policies which are responsive to economic change. Local planning policies should still be based on quantitative and qualitative assessments of need for new floorspace, although the priority given to quantitative need in the current PPS6 is proposed to be removed.

2.14 The consultation document contains no formal response to the Competition Commission's recommendation that the Government should introduce a 'competition test' into the planning system. A response from the Department for Business Enterprise and Regulatory Reform on 29th July 2008 indicated that the Government will reflect further on this recommendation following the end of the consultation period for the revised PPS6 and the conclusion of a legal challenge launched by Tesco on 30th June.

Regional Planning Guidance for the South West (RPG10)

2.10 Guidance at the regional level, contained within RPG10 (adopted September 2001), pre dates the publication of PPS6. Nevertheless, RPG10 directs local planning authorities, in their development plans, to consider the following areas:

- Seek to locate uses which attract large numbers of people in the centres of the Principal Urban Areas (PUAs) and in the other designated centres for growth specified in the spatial strategy.

- Encourage town centre developments of an appropriate scale in the market towns and larger settlements elsewhere in the region in keeping with their size and function and which can help to reduce the need to travel and encourage journeys by modes other than the private car.
- Ensure the vitality and viability of existing centres is maintained, by assessing the need for new development and by applying the sequential test. For convenience provision, RPG10 advises that a distribution of provision should be maintained, that minimises the lengths and frequency of trips.

2.11 The review of RPG10, in the form of the Regional Spatial Strategy (RSS) is now well advanced. The draft RSS was published in June 2006 and consultations closed in August 2006. The Examination in Public closed in July 2007 and the EiP Panel report was finalised in December 2007 and made publicly available in January 2008. The Secretary of State's Proposed Modifications were published in July 2008, which are subject to a 12 week public consultation period.

2.12 The latest version of the draft RSS (including Proposed Modifications) does not mention any of the towns within the Forest of Dean specifically, but rather Development Policy B relates to development at market and coastal towns. The policy advises that at market towns that meet the criteria set out in the policy provision will be made for housing, employment, shopping and other services that increase their self-containment and enhance their roles as service centres.

2.13 Policy TC1 of the draft RSS (as amended by the Panel Report and the Proposed Modifications) deals with city and town centres and encourages local authorities and other agencies to work together to ensure that the vitality and viability of the region's existing network of towns and city centres is maintained and enhanced. In doing so, it will be important to ensure that such centres are not adversely affected by inappropriate development elsewhere, and that provision is made for a mix of uses within town centres, including retail, cultural facilities, offices, other employment and housing. Policy TC1 advises that, within settlements identified in the context of Development Policy B, the range of and quality of central area facilities will also be maintained and enhanced to meet future needs. In all settlements, measures should be introduced to improve accessibility by sustainable modes, and to enhance the public realm and quality of the town centre environment. In doing so, local authorities and other agencies should recognise the role of central area investment in supporting regeneration objectives. The scale of new investment in retail and other facilities within town centres should take full account of changing patterns of behaviour and future levels of population growth.

2.14 Turning to housing figures, the Proposed Modifications retains the housing figures proposed in the Panel report, which is 6,200 new dwellings over the RSS period to 2026. This is equivalent to 310 new dwellings per annum.

Adopted Gloucestershire Structure Plan 1991 - 2011

2.15 The current version of the Structure Plan is the Second Review which was adopted in November 1999 and therefore significantly pre-dates PPS6 and the current Regional Guidance RPG10. Since the adoption of the Second Review, the Structure Plan Third Alteration has been progressed. The Third Alteration of the Plan was progressed to an advanced stage but was not adopted. However, it is still a material consideration in all planning decisions throughout the County. A review of the retail policies in the Second Alteration of the Structure Plan is given below.

2.16 Policy TC.1 establishes the retail hierarchy within Gloucestershire, none of the towns within the Forest of Dean are specifically identified, so fall with the categories of 'other centres in principal settlements and local centres'. The explanatory text of the Structure Plan notes that the hierarchy of centres is provided to promote new investment which is appropriate to particular centres, in terms of function and character. Whilst the Structure Plan does not specifically identify any settlements in the Forest of Dean, it sets criteria for local plans to identify such settlements. The Structure Plan advises that Principal Settlements should be accessible to the community they serve and well related to public transport and the highway network; and defined to ensure that the social and economic needs of all rural areas can be met.

2.17 Policy TC.2 relates to developments which are likely to generate a significant number of trips, and advises that such developments should be located within town centres. The Policy notes that where there is a demonstrable need for such development and where suitable options for such uses are not available in town centres, preference will be for edge-of-centre locations followed by district and local centres and only then out-of-centre sites in locations which are easily accessible by a choice of means of transport.

2.18 Policy TC.3 relates to Local and Village Centres, the policy requires that provision should be made for the retention and improvement of local shopping facilities and services, especially in rural areas. Such development should be of a scale consistent with the function and character of the local centre.

2.19 Under the Third Alteration of the Gloucestershire Structure Plan, again none of the Forest of Dean towns fall into the category of Major Towns. The Forest towns are therefore covered by Policy SD.5 – Market Towns.

2.20 This policy advises that outside the PUAs and Major Towns, market towns should be identified in the relevant District Local Plans which should form the focal points for a smaller scale of development which is consistent with the character, role and function of the settlement, and supports local services and the social and economic well being of local communities. They should therefore be:

- Accessible to the community they serve and well related to public transport; and
- Defined to ensure that the social and economic needs of all rural areas can be met, taking into account their location relative to other settlements and environmental considerations, including those in adjoining administrative areas.

Adopted Forest of Dean Local Plan Review 2001 to 2011

2.21 The Forest of Dean Local Plan Review (2001 - 2011) was adopted by Forest of Dean District Council in November 2005 and Chapter 5 deals with retailing and the town centres in the District. The Council seeks to ensure that the shopping needs of the District's residents are met without disadvantaging any sector of the community or affecting the vitality and viability of any of the existing centres. The local retail hierarchy is headed by Principal Towns (Lydney, Cinderford, Coleford and Newent). All provide for local shopping needs and act as focal points for development and service provision in the rural areas, a role which should be supported and enhanced. The plan notes that existing shopping provision in the District is largely concentrated within these towns, which are the focus of this retail study. The three towns of the south Forest are located quite close to each other and have similar catchment populations. Unlike many rural areas therefore, there is no single dominant shopping centre in the District. There is competition between the three centres for shopping and each provides a similar range of services.

2.22 The Plan notes that, due to the features of the towns and their close proximity, there are limitations on the potential for further shopping development because of the limited catchment population and localised competition. It highlights that this limitation is compound further by the proximity of the Forest towns to nearby larger centres, in particular the sub-regional centres of Cheltenham and Gloucester and other significant towns such as Monmouth and Chepstow, all of which offer a wider range of services and facilities, which attract shoppers out of the towns in the Forest.

2.23 In the north of the District, Newent has a small and rural catchment population which limits the range of local services provided in the town centre. Other completing and larger centres are also accessible to the catchment population, including Gloucester, Ledbury and Ross-on-Wye.

2.24 The Local Plan sets out the Council's objectives in relation to retailing:

- To promote the vitality and viability of town centres whilst ensuring the preservation and enhancement of their character and environment.
- To identify and protect for primary retail use those town centre sites which offer realistic development potential over the Plan period.
- To provide opportunities for non shopping development in town centres which will add to the diversity of attractions.

- To ensure that development in any one of the three south Forest towns does not have an unduly detrimental effect upon any other.
- To support and provide for accessible local shopping opportunities.

2.25 The Local Plan acknowledges that a range of retail facilities needs to be maintained at all levels in the settlement hierarchy if people's needs are to be met without requiring unnecessary travel. The range of facilities in each centre will therefore directly affect the extent to which it can function as a self contained community. The Plan notes that the District falls within the retail trade area of Cheltenham and Gloucester which function as sub-regional shopping centres and are identified in the RSS as the administrative and distributive focus for much of Gloucestershire.

2.26 The three main town centre and retail policies in the Local Plan relate to: retail development in defined town centre (Policy (R)FS.1); retail development outside defined town centres (Policy (R)FS.2); and, local shopping provision (Policy (R)FS.6).

2.27 Policy (R)FS.1 advises that retail development will be permitted in the defined town centres, provided it will not:

- Cause harm to the Development Plan strategy
- Adversely affect the vitality and viability of town centres when considered with any other recent or proposed development
- Result in a significant increase in the length and number of car-based trips
- Create an unacceptably adverse environmental or traffic impact
- Result in an unacceptable limitation in the range and quality of allocated sites for other uses.

2.28 Policy (R)FS.2 advises that retail development will be permitted outside defined town centres only where there is a proven need for the development and there are no suitable alternative town centre sites or, in the absence of suitable town centre sites, suitable edge-of-centre sites, and provided it will not:

- Cause harm to the Development Plan strategy
- Adversely affect the vitality and viability of town centres when considered with any other recent or proposed development
- Result in a significant increase in the length and number of car-based trips

- Create an unacceptably adverse environmental or traffic impact
- Result in an unacceptable limitation in the range and quality of allocated sites for other uses

2.29 Policy (R)FS.6 deals with local shopping provision advising that within any of the defined settlement boundaries shown on the Proposals Map the development of shops and community facilities designed primarily to provide for neighbourhoods or villages will be permitted where the amenity of surrounding residents is not impaired and safe and convenient access and parking can be provided.

2.30 Other retail policies in the Local Plan relate to Mixed Uses in Town Centres ((R)FS.3) ; Primary and Secondary Retail Frontages ((R)FS.4); and Shop Fronts ((R)FS.5). In (R)FS.3, the Council recognises the importance of mixed uses within the town centres, and particularly the use of upper floors. Such development is likely to increase the range and choice of services available to town centre users and can be beneficial to the urban fabric in assisting with the maintenance and improvement of buildings. Overall, this will contribute positively to the vitality and viability of the town centre.

2.31 In relation to primary and secondary retail frontages, Policy (R)FS.4 of the Local Plan policy currently limits the number of non A1 uses that will be permitted within the primary frontages and such changes will only be allowed where it makes a positive contribution to the vitality and viability of the town centre. In the case of secondary retail frontages, changes of use beyond A1, A2 or A3 will only be permitted where the proposed use would be complementary to the retail function of the town centre and would not affect the overall continuity of A1, A2 and A3 uses in the centre.

2.32 Turning to shop fronts within the town centres, Policy (R)FS.5 allows for alterations or replacement of shops front, provided the proposed design and materials are compatible with the architectural style and materials of the buildings and surrounding buildings. Proposed changes should also retain those elements of an existing shop front which contribute to the character or appearance of the building and the area, particularly in the case of conservation areas.

2.33 Part 2 of the Local Plan outlines the shopping and town centre characteristics of the main towns in the Forest of Dean. These comments are recorded in Chapter 4 of this report when we review the health of each town.

3. RETAIL AND LEISURE TRENDS

Introduction

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in the Forest of Dean District. A number of trends are likely to have a bearing on the future pattern of retail provision in the Forest of Dean, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to the Forest of Dean drawing from a range of published data sources, including research by Verdict Analysis and Mintel[1].

Recent Trends

Income and Expenditure

3.2 The retail sector has seen significant changes over the last 25 years, which have fundamentally altered the way we shop. One of the main drivers behind change has been the growth in incomes and expenditure. Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of about 3% per annum in real terms (Source: Experian Business Strategies, 2006), but most of this growth has been in comparison goods, with virtually no increase in convenience goods expenditure.

3.3 Over the last 25-30 years comparison goods[2] expenditure per head has shown growth of nearly 5% per annum in real terms, i.e. an overall increase of over 200% in real terms over the last 25 years. In contrast, convenience goods[3] expenditure per head has increased at less than 1% per annum in real terms. Over the last 15-20 years even stronger growth has occurred, particularly in recent years. Such very strong expenditure growth trends are unlikely to continue, but reasonably strong growth in line with long term trends appears probable over the medium-long term.

3.4 Strong income and expenditure trends have also affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or

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[1] Verdict and Mintel are leading research specialists on the UK retail industry, providing independent research into all aspects and sectors of the retail industry

[2] Non food goods such as clothes & shoes, furniture & floorcoverings, DIY & hardware, personal & luxury, electrical and recreational goods.

[3] Food and non-alcoholic beverages, alcohol, tobacco and newspaper/periodicals.

more cars has increased from about 55% to about 75%. Equally significant, the number of households with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they used to be and therefore their choices for shopping centres to visit and the distances they can travel are much greater.

Out-of-Town Retailing

3.5 In June 2006, Verdict published a review of recent trends in UK out of town retailing (UK Out of Town Retailing 2006, Verdict, June 2006), the key messages from which are outlined below:

- Over the past 10 years consumer spending at out of town stores has increased by 90% (to £81bn), substantially outperforming other locations. High Street spending increased by 43% (to £122bn) while expenditure at neighbourhood stores rose by 30% (to £44bn).
- Physical expansion was the main driver of out of town spending growth but space growth has slowed markedly during the past five years due to increasing obstacles to gain planning permission for the development of new out of town schemes.
- Total out of town sales amounted to £85.8billion in 2005, the majority of which (£81billion) was spent in traditional out of centre stores although there has been a rapid period of growth of online sales made by out of town operators which now account for £4billion of sales.
- Nevertheless over the past year, out of town sales growth slowed significantly from 5.8% in 2004 to 3.8% in 2005. While a strong performance from grocers, most notably Tesco and Sainsbury, has sustained sales growth, weaknesses from many DIY and home retailers including B&Q, Homebase and MFI weighed heavily. The most recent annual growth rate of 3.8% is much lower than the much higher levels achieved in 1995 to 1997 where year on year growth reached 10%.
- Between 1995 and 2005, out of town store numbers increased by 57%, compared with an 8% fall in high street stores and a 19% fall in neighbourhood stores. Growth in out of town store numbers slowed down in 2005, with growth driven by the rapid out of town expansion by clothing and general merchandise retailers. Verdict estimate that in 2005 out of town store numbers increased by 2.3% to 8,337 outlets.
- While high street and neighbourhood locations have both experienced declines in floorspace between 1995 and 2005, out of town space has swelled by 65% over the same period to 178.6million sq ft. In 2005, however, space growth in out of centre locations slowed substantially. An increase of 2% was less than half the average (4.1%) achieved

between 2000 and 2005. Few new major retail parks opened over the past year and many that did involved the redevelopment of existing space

- Despite losing 6.6 percentage points of their share of out of town sales over the past decade, grocers continue to dominate the market. In 2005 they accounted for just short of two thirds of out of town sales. DIY is the second largest out of town sector, taking 10.7% of sales while electricals, in third place, represent 6.8% of the market. Clothing and footwear and general merchandise have been the fastest growing out of town sectors during the past 10 years. Out of town specialist Matalan has expanded rapidly since 1995, as has Next (the first traditional high street player to target out of town expansion on any great scale). Particularly over more recent years, the development of out of town shopping parks, offering smaller units more appropriate for a comparison shopping trip, had enticed a wide selection of clothing and general merchandise operators to trial out of town formats.

- Furniture and floor coverings operators account for the largest proportion of out of town stores at 24%. Furniture and floor coverings retailers were early out of town entrants, attracted by the low rents which suited their weak sale densities. However, along with the other mature out of town sectors (food and grocery, DIY and electricals) their share of stores has fallen over the past decade as clothing and footwear and general merchandise specialists have joined the market. Particularly over the last year, furniture and floor covering store numbers have declined steeply. Part of this fall has been due to the closure of Courts and Furnitureland. Together, the clothing and footwear and general merchandise sectors have more than quadrupled their out of town space over the past decade, between them now accounting for 18.3% of the out of town store space.

- In terms of store size, DIY retailers occupy the largest units (on average 47,800 sq ft). The bulky nature of DIY and gardening products combined with the crucial importance of range as a loyalty driver in the DIY sector have encouraged the likes of B&Q and Homebase to increase their average store size substantially (a 37% increase since 1995). In pursuit of additional non-food growth, grocers also continue to seek larger stores. In the past year, for example, Tesco have added 18 of its large format Extra stores through a combination of new build and conversions. Also, during 2005, Asda opened its largest UK store in Milton Keynes at 10,200sq m (110,000 sq ft). Only clothing and footwear experienced a fall in average store size over the past 5 years. The average store size of clothing and footwear operators declined as new players entered the out of town market seeking smaller outlets than longstanding players such as Next and Matalan which favour larger formats.

Town Centre/High Street Retailing

3.6 A report published by Verdict in August 2006 (UK Town Centre Retailing 2006, Verdict) provides an up to date summary of recent trends in town centre retailing. The key messages from this report can be summarised as follows:

- In 2005, town centre retailers generated £122.3billion of retail sales, a rise of 43% over the last 10 years (1995 to 2005). Its rate of growth is significantly less than the 56% for retail overall, with out of town and online retail sectors gaining a share at town centres' expense.
- Limited physical expansion is the primary explanation for the modest sales growth within town centres. While there has been significant redevelopment of urban shopping infrastructure in recent years, many new facilities have replaced existing shops and there has been a net decline in space. Instead, town centre retailers have focused on improving existing store sales to lift sales densities and cover rising occupational costs to offset selling prior to deflation.
- Minimal growth and a fall in sales have accelerated the decline in town centres' share of total retail expenditure. Though this fell below 50% in 1997, its rate of decline has been gradual until 2005 when its share dropped by 0.9% to 46.3%. In the last 12 months, town centre retailers have ceded ground to non-store and out of town retailers.
- In 2005, the number of town centre shops fell by 1%, taking the total below 148,000 following a similar decline in 2004. The decline in shops has also been matched by a reduction in trading space, with a reduction of 0.2% in 2006 (the eighth time in the last 10 years that space in town centres has decreased). Indeed, despite the construction of numerous new shopping centres, total town centre shopping space have shrunk by 2.4% (or 7.6million sq ft) over the last 10 years.
- Despite a massive migration of grocers to out of town superstores, town centre grocers still take £1 in every £4 spent in the town centre. Indeed, with a shortage of sites for new stores on retail parks and recognising that many people prefer to buy food locally, grocers including Tesco, Sainsbury and Somerfield are focusing investment on enhancing their town centre coverage. After grocers, it is clothing and footwear specialists that have the highest share of town centre retail. Though some clothing retailers have established out of centre operations, almost £4 in every £5 spent in this sector is channelled through the town centre.

The Internet and Non-Store Trading

3.7 In recent years there has been a rapid increase in the use of the internet for online shopping. The Verdict publication 'E-Retail 2007' provides the following findings:

- The e-retail market grew at its fastest pace for five years in 2006. Despite years of breakneck growth, there is no sign that the online boom is set to end. In 2006, online retail spending grew by 33.4% – almost 13 times faster than the retail sector overall – to a record £10.9bn. This pushed the sector's share of total retail spending to 4.0%, a 0.9 percentage point jump on 2005. It also means that over £1 of every £3 of extra money spent by consumers at retailers in 2006 compared with 2005, was spent online.
- There has been a surge in the number of retailers operating transactional websites. Since the beginning of 2006 new transactional sites have been launched by all Arcadia brand sites, Dunelm, IKEA, Oasis, Superdrug, Waterstone's and Wickes while many existing retailers have greatly scaled up their offers including Asda, B&Q, M&S, Tesco and Woolworths.
- Retailers that have yet to take the plunge online fall into three camps – food retailers where the infrastructure cost associated with an online launch and the strength of competition act as deterrents, value retailers (such as Matalan, Primark and Peacocks) whose business model depends on driving high sales densities from their stores. Many smaller specialists have also stayed out of the online race with their limited scale making it challenging to finance major online infrastructure.
- Electricals, the largest online sub sector, achieved the fastest growth rate in 2006. Online sales of electricals grew by an impressive 41.4% to £2.8bn over the year to account for 11.6% of all electricals purchases. Key to its phenomenal success was strong consumer demand for flat panel TVs and an impressive pipeline of new technologies such as next generation consoles and digital music players. With the sector characterised by a high prevalence of homogeneous products and manufacturer brands, price has become the key battleground and the ease of price comparison online has made the Internet an ideal shopfront for retailers. This combination of factors has attracted a broad church of retailers. In addition to traditional specialists such as Comet and Currys, a host of high street non-specialists (including Argos, M&S, Next and Robert Dyas) and leading grocers have all entered this market.
- Narrowly behind electricals by sector size and growth is the online food & grocery market. Though this sector is still dominated by Tesco, rival grocers are now making inroads. After initially misjudging the potential of the Internet, Sainsbury and Asda have both increased their investment online and are being rewarded with substantial sales growth. Yet, despite being one

of the longest established online sectors, food & grocery still has ample opportunity for growth since its share of the total food & grocery sector is still just 2.4%.

- One in three adults is now an online shopper. In 2006 18.0m consumers bought retail goods over the Internet, a 23.1% increase on 2005. The online shopper population has been boosted by widespread uptake of broadband services whose costs have fallen markedly over the last two years. Also, retailers have begun to market their online services much more prominently and see online development as a key channel for future growth now that teething problems have been resolved.
- Spend per head reaches £606. As shoppers have become more confident with using the Internet and retailers' reputations for reliable delivery have improved so, too, has the average annual spend per shopper to £606 in 2006, an 8.2% year-on-year advance. However rather than being driven by customers spending more each time they shop, spend has grown because consumers are shopping more often. Ease of access means that over the last three years the average number of shopping trips undertaken has increased from 11.2 to 14.2 over the year, while the average spend per trip at £42.68 is actually lower than it was 2003.
- Men again outspend women online. After three years when women have spent more than men online, men spent more than women. Male spending increased by 40.0% to £5.9bn while female spending rose by 26.4% to £5.0bn. Despite being lower overall, female expenditure is higher than male expenditure in five of the 10 retail sectors tracked: clothing & footwear, homewares, health & beauty, food & grocery and music & video. The biggest imbalance between the sexes is in electricals where men spent £1.9bn in 2006, more than twice the amount spent by women. However the number of female online shoppers grew slightly faster than the number of male shoppers (by 25.3% to 21.3%).
- 35-44s stand out as the most significant age group for shopper numbers, total spend and spend per head. Online shoppers in this age group typically spend £869 per head and collectively account for a third of all online spending. A key reason for this has been the rapid growth of the food and electricals markets, both categories that the age group shops heavily.
- Over 55s now spend more than 15-24s online. Older shoppers are discovering the benefits of online shopping in increasing numbers as they grow more confident with using the Internet. Collectively they now spend £1.5bn online and as such have overtaken 15-24s whose spend per head fell in 2006, largely due to a declining music & video market and lower online spending by the age group on food & grocery.
- Lower prices have become an even more important reason to shop online. As consumers' disposable incomes have been squeezed by interest rate rises and the higher cost of utilities, shoppers have become keener to search around for a bargain, with 49% of them mentioning lower prices as a reason for shopping online, a six percentage point gain on 2005. With concerns over online security and delivery standards growing, company reputation has become

the third most important factor (mentioned by three in 10 shoppers), eclipsing considerations of service and product choice.

- Four out of five online purchases are made at the expense of another retailer. Though 35% of shoppers say their online purchases are at the expense of a high street retailer this is unsurprising given that it takes the largest share of retail expenditure (45.7% in 2006) and that many high street retailers also sell online. Only 14% of shoppers say that their online purchases are made instead of a visit to an out-of-town retail park and 5% (compared with 15% in 2001) are instead of shopping by mail order as that channel shifts online.
- Over the next five years the online sector is set to almost triple in value – in 2011 Verdict expect online spending to reach £28.0bn (equivalent to 8.9% of all retail spending), as the shopper medium become more integral to consumers' lives. The growth in spending will be driven by consumers shopping online more often, rather than the result of a further expansion of the online shopping population which we expect to grow much more slowly (47.3%) over the forecast period. Over the period the typical spend of an online shopper will grow from £606 to £1,056 per year with spending on clothing & footwear, DIY & gardening and food & grocery posting the fastest growth rates.
- Over the next five years Verdict expect the market almost to triple. Growth of 156.7% will take its value from £10.9bn to £28.0bn as a result of a growing online shopper population and because online shopping will become much more integral to consumers' lifestyles. In the process online's share of total retail expenditure will increase from 4.0% to 8.9%.
- The fastest growing online market over the forecast period will be food & grocery. Despite being the second largest sector it still has the most potential for growth due to the vast nature of the food & grocery market. Its growth will narrowly beat DIY & gardening and clothing & footwear which will also more than triple in value over the forecast period. By contrast online spending will not even double in books and furniture & floorcoverings.
- We expect annual online spend per shopper to approach double the rate in 2006 of £606 by 2011 at £1,056. Shoppers will gain more confidence in shopping online over the next five years as wireless access becomes more widespread and more retailers actively promote their online operations.
- In particular, younger shoppers that already use the Internet heavily will raise spending. As their incomes rise, they are likely to spend much more online than previous generations who are more predisposed to make purchases from physical shops.
- Food & grocery, currently the second largest online sector, will overtake electricals in 2009 to become the largest contributor to online retail spending. Over the next five years sales will more than double to £8.03bn, but due to the sheer size of the food & grocery market, penetration will at 6.7% in 2011 remain below the retail average of 8.9%) suggesting continuing potential for further long term growth.

- The electricals market was the star performer of 2006, boosted by especially high sales volumes of flat panel TVs in the run up to the World Cup as retail prices dropped. Looking ahead, electricals, the largest online sector, will continue to enjoy robust growth though it will no longer outperform the online channel. Counting in favour of further growth are the facts that: electricals demand is dominated by manufacturer brands, which are easy to compare online; and many traditional electricals retailers do not rank highly for customer satisfaction, making shoppers willing to try alternative retailers offering discounted prices. However growth will be tempered because it is unlikely that there will be further 'must have' high ticket product launches with the same impact as flat panel TVs during the forecast period.
- Having broken through the £1bn sales barrier in 2006, clothing & footwear is set to triple over the forecast period. Though it is the largest retail sector after food with annual sales of £36.8bn in 2006, it remains relatively undeveloped online. But it achieved the second highest growth rate after electricals in 2006, primarily due to a more proactive approach from retailers (for instance transactional site launches by the Arcadia brands and Mosaic Group) which should continue to drive sales in 2007. In addition traditional mail order specialists' business models such as N Brown and Littlewoods Shop Direct will begin to reap the rewards of investment in developing online sales.
- Music & video continues to stand out from the crowd as the sector with the highest penetration. In 2006 online sales accounting for almost £1 in every £4 spent by consumers on CDs and DVDs but by 2011 online sales will account for over half of the market. Further increases in uptake in digital music downloading will drive sales and from 2007 faster Internet connections will enable video downloading to become much more widespread. With such a huge shift in spending online, we expect widespread closure of high street music & video specialists and video rental stores whose viability will be undermined by falling volumes.
- Though slow to exploit the potential of the Internet, DIY & gardening retailers are now increasing investment in the channel. This is despite the poor performance of the overall DIY market which is set to be one of the worst performers in retail over the forecast period. With market leader B&Q expanding its online product offer, Home Retail Group committed to enhancing its multichannel capabilities and garden centres now investing in online infrastructure, the Internet is set to become a much more important sales channel in this sector.
- Books is one of the most mature sectors online with the Internet already claiming £1 in every £9 spent by consumers. Though Amazon retains a lion's share of the market it now faces new competition from Waterstone's which started its own online service in 2006. Both retailers face a potential threat from the digitisation of books. At present this is limited to out-of-print and selected academic titles but the range of titles available could be far broader if copyright issues are resolved. Specialists are also likely to face greater competition from Tesco as it broadens its Direct offer.

- Though furniture & floorcoverings will be the slowest growing sector over the next five years, online sales will still approach doubling over the period. While the need of many customers to see and try out furniture prior to purchase limits the potential of online as a sales channel, furniture retailers that do not offer shoppers the convenience of online ordering risk losing out as more shoppers expect to be able to buy online. To date most online sales have been low ticket and driven by non-specialists, particularly Argos, but over the forecast period we expect specialist to play a much more prominent role. In a slow growth market the Internet offers both mainstream specialists such as DFS, Furniture Village, Harveys and MFI (all of which were late to develop transactional functionality) and focused niche specialists a significant source of new revenue.
- Health & beauty will continue to have the lowest online penetration. Over the next five years, online health & beauty spending will rise by 133.4% to £615m. Health & beauty is unusual because grocers rather than specialists account for the largest slice of the market since it is highly convenient for shoppers to buy health & beauty items at the same time as their regular grocery shop. However over the forecast period we expect health & beauty specialists to make a greater contribution to market growth following investment by Boots to develop its site as a healthcare portal and Superdrug's addition of transactional capability to its website.

Convenience Retailers

3.8 In December 2006, Verdict published its UK Grocery Retail 2007 Research Report (December 2006), which provided the following summary of the UK food and grocery markets:

- Food and grocery specialists have performed well in recent years, driven mainly by the strength of the leading grocers. Grocers, particularly Tesco and Asda, have opened substantial quantities of new space allocating increasingly large areas to non-food categories. This has helped them gain sales at the expense of specialist operators in the wider retailing arena.

- Also, over recent years, Tesco and Sainsbury have greatly increased their presence in neighbourhood locations through their Express and Local fascias respectively. While in many cases these stores have opened in the place of other grocery stores, their strong retail brands, wide product range and lower price reputations have enabled them to improve the sale densities achieved on these sites considerably.

- Grocers superstores (defined as being over 2,323sq m (25,000 sq ft) continue to be the core drivers of growth in the food and grocery market. In recent years the likes of Tesco and Asda have aggressively sought to increase the selling space of their existing stores through extensions and the installation of mezzanine floors. This additional space is often being used to house increasing large ranges of clothing and footwear, homeware, electrical and music and video products.

- Between 1996 and 2006, Verdict estimate that superstore numbers have increased by around 30%, whilst other parts of the food and grocery market (off licences, food specialists, convenience stores and newsagents) have all experienced falls in store numbers. These trends in relation to store numbers are also matched by trends in food and grocery floorspace, with superstores increasing their selling space by over 40% since 1996 and other sectors of the food and grocery market experiencing falls of up to 20% in available space. Apart from sales in off licences over the past 5 years, sales in all parts of the food and grocery market have increased since 1996 with, unsurprisingly, the superstore sector being the best performer with sales increasing from £34billion in 1996 to over £60billion in 2006.

- Superstores have also benefited from the prolific growth in grocers' on line sales over the past 5 years as orders are typically fulfilled from superstore shelves.

- As noted above, all major types of food specialists have struggled in recent years under pressure from major grocery multiples with their large superstore format and smaller supermarkets and convenience stores. However, the performance of different types of food specialists has varied. Bakers have performed best among food specialists with growth of 30% in the past decade. Much of this performance has been down to bakers' ability to diversify into snacks and lunch products. Meanwhile, fishmongers have suffered the worst, particularly in the late 1990s, as many superstores introduced fish counters. Fishmongers also have a generally less widespread appeal than other food specialists. Greengrocers originally performed reasonably well against supermarkets due to the short life of fresh produce that means not all supplies for the week can be bought as part of a weekly shop. However, later development of fresh produce in convenience stores has hit sales of greengrocer specialists.

- Traditionally, food and groceries share of total retail spending has followed a declining trend as people divert a greater proportion of their spending to non-food categories such as electricals which has performed particularly well over the past few years. Whilst this trend has temporarily reversed in 2005 and 2006, core food and grocery typically takes a decreasing share of consumers' increasingly disposable incomes each year. This has been the main reason behind grocers' stronger focus on non-food growth over recent years. In particular, through their increasing estates of large former superstores, the leading grocers have made substantial progress in markets such as health and beauty, music and video. More recently as these core markets have matured, the likes of Tesco, Asda and to a lesser extent Sainsbury, have added further non-food categories to their mix including clothing and footwear, homewares and electricals. Most recently, Tesco and Asda have introduced limited DIY and furniture ranges, giving them exposure to some degree in virtually every retail sector.

The Future

Retailing

3.9 Within its publication 'UK Retail Futures 2011' (February 2007), Verdict provide a detailed analysis of UK retailing forecasts up to 2011. The key points from the publication can be summarised as follows:

- Following a December surge in spending in 2006, which helped lift annual retail expenditure growth to 2.9%, Verdict expect retail expenditure to increase by just 2.8% in 2007. A number of factors will conspire to weigh against retail beating the 2006 performance, the foremost of which would be higher interest rates. In the future, retail's share of total consumer spending is set to continue the decline which has characterised household spending patterns for much of the last decade. Consumers are increasingly directing spending into a raft of other categories, with leisure being the key beneficiary. In the past ten years, the rising propensity for overseas travel and increase in other entertainment has been at the expense of retail spending. To add to this, rising home ownership costs and household bills take a larger chunk of consumers' household spending. These developments have resulted in retail share of the total consumer expenditure falling by 3.4 percentage points over the last decade to 35% in 2006. Up to 2011, Verdict expect this proportion to decline further to 31.7%.

- Between 2001 and 2006, Verdict estimate that retail sales as a whole have increased by 17% and they predict that between 2006 and 2011, sales will grow at a slower level at 15%. Broken down into individual sectors, the highest performer is likely to be the online retail sector with a predicted growth between 2006 and 2011 of 87%.

- Though the underperformance of store-based retail will continue up to 2011, closer analysis of its three sub-sectors reveals some contrasting performances. Town centre, which accounts for 45.7% of retail sales, will perform weakly over the next five years. Verdict forecast it will increase sales by just 6% by 2011, despite a flood of new space in the form of town centre developments across many towns and cities.

- In contrast to town centres, out of town retail parks provide a convenient and relatively comfortable shopping experience for customers and this preference is set to continue. In addition to this, towns and cities that will receive a fillip from new shopping centre developments will only succeed, in Verdict's opinion, in capturing shoppers from other less developed centres, resulting in a negligible overall gain for the town centre sector from a holistic perspective. As a result, the town centre will see its share of retail sales decline by 3.7% to 42% by 2011.

- Despite the introduction of PPS6 in April 2005, all but halting the development of certain retail formats such as fashion parks in a bid to revitalise town centres, Verdict believe that this will do little to deter some retailers who are very keen on expanding into the out of centre arena. Besides grocers, the likes of Next and TK Maxx, with their family focused destination offers, are continually searching for new space and will be more flexible in the requirement for new locations.

- Verdict expect the neighbourhood shopping sector to register the slowest growth, boosting its sales by just 4.6% over the period up to 2011. While grocers will undoubtedly continue to strengthen their presence in the sector, they will continue to command just a small fraction of the overall market. In 2006, Tesco and Sainsburys combined neighbourhood market share amounting to just 7.3% and this is unlikely to increase significantly over the forecast period. A key focus of expansion for these players will be the out of town retail parks where their larger stores enable them to carry far more product ranges and generate much higher levels of footfall. Growth in the neighbourhood sector will be subdued by the decline of small independents (who command the largest share of this market) and these players will be unable to compete effectively against the multiples.

- Verdict predict that store numbers in the UK will continue to fall during the period 2006 to 2011, although at a slower pace than over the period 2001 to 2006. Verdict forecast total stores will decrease by 3.8% by 2011, compared with a 5.1% decrease in the period 2001 to 2006. The store decline will be most severe in the neighbourhood sector where Verdict expect a net closure of over 12,000 shops. These closures will result primarily from competitive pressures, with the economics of local retailers made more severe by the expansion of out of town superstores, new shopping construction in nearby towns and cities and the continuing increase in the popularity of online shopping.

- In the town centre, store numbers will decline until 2007 though this trend will be reversed in the latter years of the forecast period (up to 2011) to produce growth of 0.8% over the period 2006-2011. The growth in store numbers will result from the many large-scale shopping centre developments due to open over the next five years, allowing multiples to increase their store portfolios.

- One sector to grow store numbers rapidly will be out of centre retailing but even here the growth will not be as impressive as over the previous five years. Planning constraints, consolidation and estate rationalisation programmes of large mature players will cause store numbers to grow more slowly up to 2011. In this area, Verdict predict a 12% increase in out of town store numbers, compared with a 19% increase between 2001 and 2006 and a 28% increase between 1996 and 2001.

Technological Influences

3.10 Verdict expect major changes that will affect the supply chain (UK Retail Futures 2011, February 2007). RFID (radio frequency identification) is a microscopic electronic tag within each product that is set to replace the ageing bar code. This will enable retailers to identify individual articles rather than specific types of products and it does not require contact with a scanner as radio signals can be picked up within a range of about 6 metres (20 feet). They can also be scanned very quickly and do not require individual scanning.

3.11 XML (Extensible Mark-up Language) will transmit information between computers and will affect the relationship between retailers and suppliers. This is an improvement over the currently used EDI (electronic data interchange) as computers running different software can communicate with each other. These new technologies will help reduce costs, enhance collaboration between retailers and suppliers, bring new products to the market quicker and improve efficiency.

4. ASSESSMENT OF TOWN CENTRES

Overview

4.1 This chapter of the Forest of Dean Retail Study provides a detailed assessment of the vitality, attractiveness and viability of the four principal town centres in the Forest of Dean (Lydney, Coleford, Cinderford and Newent). Drawing upon a standard methodology for assessing town centre health, our analysis has found that town centres in the Forest of Dean have largely similar characteristics and perform similar roles and functions for their individual catchment area. Our analysis has found that Lydney, Cinderford and Coleford are the dominant Town Centres in the District, with Lydney possessing the by far the highest turnover levels in the District (over double that of Newent, which as the lowest town centre turnover levels). Newent does offer a reasonable range of services but serves a smaller rural catchment area in the North of the District, experiencing commercial competition from the larger centres of Cheltenham, Gloucester, Monmouth and Ross-on-Wye.

Introduction

4.2 The purpose of this section is to provide an assessment of the current state of retailing within the Forest of Dean District and its relationship to surrounding areas, by providing a health check of the main town centres, plus an overview of out-of-centre provision. Section 4 of PPS6 advises that monitoring is essential to the effective planning and management of town centres and should be used to inform the review of site allocations and town centre policies. Given the need to submit an Annual Monitoring Report to the Secretary of State, PPS6 advises that the vitality and viability of centres should be kept under review.

4.3 Measurements of vitality and viability of town centre health is achieved through a basket of tried and tested indictors. The information gathered for town centres is useful not only to inform the review of allocations and policies, but is also useful for assessing the likely impact of retail development proposals. In line with the project brief issued by FODDC, the health of the four principal town centres in the District (Lydney, Cinderford, Coleford and Newent) has been measured. The indictors which have been reviewed for each of the centres are:

- diversity of main town centre uses (by number type and amount of floorspace)
- the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations
- the potential capacity for growth or change of centres in network
- retailer representation and intentions to change representation

- proportion of vacant street level property
- pedestrian flows
- accessibility
- customer and residents' views and behaviour
- state of the town centre environment quality.

4.4 It should be noted that due to the size and function of some of the centres, it is not possible to gather information on a number of the indictors, for example retailer requirements.

4.5 Information on the indictors of town centre health listed above has been gathered from a number of sources, including Forest of Dean District Council, Experian Business Strategies, the Department of Communities and Local Government and the Focus Database. This information has been supplemented by surveys undertaken by GVA Grimley during November 2007.

4.6 In addition, the results of the Forest of Dean Shopping Survey, conducted by NEMS Market Research in 2007, also offer an important contribution of the assessment of town centre health. Part of this survey has been designed to elicit qualitative aspects of retail provision, including:

- which centres are considered main shopping centres;
- perceived positive attributes of each town centre;
- perceived negative attributes of each town centre; and
- potential improvements which would encourage people to visit the town centres more often.

4.7 In addition, a review of retailer requirements for representation in the main centres has also been undertaken. This sought to identify retailer interest in the principal Forest of Dean town centres.

The Sub-Regional Retail Hierarchy

The Existing Position

4.8 The Forest of Dean District lies to the west of the City of Gloucester and east of Monmouthshire. Both Gloucester and Cheltenham function as sub-regional shopping centres and are identified in the draft Regional Spatial Strategy (RSS) as the administrative and distributive focus for much of Gloucestershire. Bristol is also only 25 miles to the south of the Forest of Dean and is identified in the Draft RSS as a regional shopping centre. The draft RSS identifies market towns as playing a leading role in the economic and social development of rural parts of the South West and states that plans should provide for development to maintain and reinforce those roles. Of the market towns in the district, Lydney, Cinderford, Coleford and Newent are all classified as Principal Town

Centres under the Local Plan definition. All provide for local shopping needs and act as focal points for development and service provision in the rural areas. Although, due to the close proximity of the three South Forest towns, there is a degree of competition between them, which to date has limited the level of retail expansion experienced by each of the towns.

4.9 At the strategic level, the Gloucestershire Structure Plan, which was adopted in 1999, sets out a strategy for the Forest of Dean. This is one of continued restraint in the northern part of the Forest, whilst in the southern part of the Forest the strategy is one of encouraging economic regeneration. In the southern part of the Forest it is envisaged that the majority of development will take place in or adjacent to the principal settlements of Cinderford, Lydney and Coleford. The southern part of the Forest has traditionally been an area of growth in order to encourage economic regeneration. This forms a sub-strategy for the area, which is to encourage investment and increase the population base to broaden the labour supply and skills, and encourage growth in the service sector.

4.10 In terms of the retail planning policy within the District, the adopted Local Plan refers to Lydney, Cinderford and Coleford as the principal settlements for the focus of retail development. Newent, the other principal town, should service a more local function, providing retail services and facilities for its local, rural catchment population.

4.11 Looking wider than the District boundary, Table A below compares Lydney and Coleford with other regional and sub-regional centres in terms of Class A retail floorspace. These floorspace figures have been derived from Department of Communities and Local Government data. The Forest of Dean centres are shown in bold text. For the majority of centres, the table also includes a ranking from the VenueScore index which assesses the performance of a selection of town centres based on a 'basket' of retailer representation and floorspace information. The table indicates that none of the Forest towns have a Venue Score Ranking, which indicates the comparatively small size of the Forest towns. Both Cinderford and Newent are excluded from the table as they do not have either DCLG floorspace information or a VenueScore ranking. Lydney is the largest of the Forest towns with an A1 floorspace of 7,310sq m and 9,540sq m of total retail floorspace. This information illustrates the level influence the centres of Cheltenham, Gloucester and Bristol currently have on the shopping patterns in the Forest of Dean.

Table A: Sub-Regional Shopping Hierarchy

Tier/Centre	Class A1 Floorspace (sq m gross)	Total Class A Retail Floorspace	VenueScore Ranking
Bristol	308,450	368,730	25
Cheltenham	156,300	182,130	20
Chepstow	15,600	19,200	-
Coleford	**4,370**	**5,060**	**-**
Gloucester	147,880	168,150	97
Hereford	95,370	118,060	77
Ledbury	8,460	10,700	-
Lydney	**7,310**	**9,540**	**-**
Monmouth	25,080	29,740	-
Ross-on-Wye	22,700	28,490	-
Stroud	35,020	42,200	-

Source: DCLG & VenueScore

Note: No information is available for either Cinderford or Newent due to the size of the town centres.

The Future: Retail Development Proposals in Surrounding Settlements

4.12 As noted above, settlements surrounding the Forest of Dean have a major influence on the shopping patters of local residents. Within these neighbouring local authority areas significant retail floorspace exists and there are also significant retail developments proposals in the pipeline. These proposals, due to their size, have the potential to impact upon future shopping patterns within the Forest of Dean and are a salient factor for consideration later in this study, when various policy options are considered.

Cheltenham

4.13 Cheltenham Borough Council do not currently have any firm plans for redevelopment or improvements to the town centre, however, the Borough-wide retail study was completed in December 2006 and provides details on the level of additional retail floorspace needed up to 2016 and recommends a strategy for the implementation of this additional retail floorspace.

4.14 The study advises that there is no need for additional convenience floorspace up to 2016, once the existing planned commitments have been built-out. The study notes that this does not prohibit improvements to floorspace provision through refurbishment of existing stores within the city centre and district centres, in line with a strategy to enhance the vitality and viability of those centres.

4.15 Turning to the need for comparison floorspace, the study identifies a need for up to 6,000 square metres net by 2011 and between 17,000 square metres net and 26,000 square metres net by 2016.

4.16 The retail strategy recommended by the Council's retail study suggests that the area to the north and west of Beechwood Shopping Centre represents the best opportunity for an expansion of the town centre for retail development. Through comprehensive redevelopment, this area has the potential to provide a significant amount of additional comparison goods floorspace and provide the large-scale units which are currently lacking in Cheltenham town centre.

Gloucester

4.17 The key redevelopment currently underway in Gloucester is the Gloucester Quays regeneration scheme. This is a £200 million scheme for a Factory Outlet Centre, foodstore, hotel leisure developments, 1,000 new homes and a new bridge across the Gloucester and Sharpness Canal, which covers an area of 25 hectares of brownfield land. The scheme will include both new build development and the re-use of a number of the dockside warehouses. The Factory Outlet Centre in particular will be a key retail attraction for shoppers from the Forest of Dean.

4.18 Apart from Gloucester Quays, the Gloucester Heritage Urban Regeneration Company is also promoting regeneration schemes at Blackfriars (4,000sq m of retail, 5,000sq m of bars and restaurants and a new hotel), the Canal Corridor (residential and employment uses), Gloucester Docks (office-led development), Kings Quarter (25,000sq m of new retail floorspace), Greyfriars (residential uses) and the Railway Triangle (residential, hotel and office uses).

Bristol

4.19 Bristol city centre is the dominant shopping centre in the sub-region with around 370,000sq m of retail floorspace. In addition, Cribbs Causeway on the north-western edge of the Bristol urban area provides the region's largest out-of-centre shopping mall, which opened in 1998 and attracts custom from across the south-west and South Wales. Bristol city centre is currently undergoing a major regeneration programme to provide the Cabot Circus retail development area. The development, which is due for completion in Autumn 2008, will provide around 1 million square feet of high quality retail and leisure uses, as well as apartments, offices and public spaces in the heart of Bristol. The completed scheme will feature:

- An expanded shopping district, including a new landmark department store, a further 15 major stores, and a total of 120 new stores.
- A wide range of leisure uses, including a 13-screen Cinema.
- Over 200 new homes integrated into the development, including 24 affordable homes.
- A state-of-the-art car park with over 2,600 spaces.
- Three new pedestrian streets.
- Buildings which reflect the city's heritage and character.

- Dedicated public spaces.

Lydney Town Centre

Structure of the Town Centre

4.20 Lydney Town Centre has a broadly linear structure. The adopted Local Plan defines the Town Centre Shopping Area along High Street and Newerne Street, up to and including the bus station site. Within this area, primary retail frontages are defined along Newerne Street (excluding the forecourt frontage of the Paramount Garage).

4.21 The Local Plan notes that Lydney is the main town serving the southern part of the south Forest, with a wide catchment area including several large settlements, such as Bream.

4.22 Lydney has a strong advantage in comparison with other towns of the south Forest in that it has better accessibility by road. The A48 route through Lydney connects with the M48 near Chepstow and with the M5 at Gloucester. The completion of the Lydney bypass has removed some traffic from the town centre. However, many locally generated trips and those with an origin or destination in the central part of the town still travel through the town centre. The effect is that high volumes of traffic movement remain in High Street/Hill Street/Newerne Street (the principal shopping area), to the detriment of the town centre environment.

4.23 There are two allocations for development in Lydney town centre within the adopted Local Plan: 18 dwellings on land south of Hill Street and 10 dwellings on land at Hill Street.

Diversity of Uses

4.24 Information on the diversity of uses within the town centre boundary has been obtained from the Forest of Dean District Council. This information from the Council indicates composition of the centre is as follows:

Table B: Retail Composition of Lydney, 2007

Sector	2006		UK Average %
	No. of Units	%	
Convenience	8	7.5	9
Comparison	49	46.2	46
Service	42	39.6	33
Vacant	5	4.7	12
Miscellaneous	2	1.9	1
Total	**106**	**100**	**100**

Source: Forest of Dean District Council, 2007. Figures may not add due to rounding

4.25 There are currently eight convenience units in the centre, which proportionately is slightly below the national average. The proportion of comparison units in the town is equivalent to the national average. The proportion of service uses in the town is slightly above the national average. At the time of the survey, there were only five vacant units in the town centre, which equates to 5% of overall provision. Overall, the retail composition of Lydney indicates a varied range of outlets which are a positive factor towards overall town centre health.

Retailer Representation

4.26 In terms of retailer representation, Lydney has a large Tesco store on at the southern end of High Street. This store extends to some 1,739sq m net and stocks a wide range of convenience goods, although the comparison offer is limited to seasonal items, a small range of small household electrical options and some books and CDs. Access is gained via High Street and the store offers a large surface level car parking area to the front of the store as well as a petrol filling station, with a small kiosk selling a basic range of convenience items. The location of the Tesco unit within the town centre allows pedestrians the opportunity to walk between the store and the main retail core. Survey information on the level of these linked trips is contained later in this report There is also a Co-op store on Newerne Street, in the centre of the retail core (and defined primary retail frontage). This store is slightly smaller than the Tesco, extending to 1,677sq m net, and sells a wide range of convenience goods, along with some comparison items. This store has recently been refurbished.

4.27 There is also a Somerfield store in the town centre, which is accessed from Ham Road and although this store is slightly separated from the core retail area, it is much closer than the Tesco store and linked trips between the store and the town centre are also likely to occur. Indeed, the household survey results indicate that 49% of those shoppers that use the Somerfield for main food shopping also visit other stores in the town centre as part of the same trip. The Somerfield store is smaller than both the Tesco and the Co-op, extending to only 910sq m net and offers a more limited range of convenience goods. Both the Co-op and the Somerfield stores are within easy walking distance of the bus station, which is adjacent to the retail core of the town and offers convenient access to the majority of shops and service in the town. In addition to the three national operators there are also a number of independent convenience retailers in the town including bakers and newsagents.

4.28 In the comparison goods sector, the only national major retailers are Woolworths, Lloyds Pharmacy, Oxfam Charity Shop and Travis Perkins. The remainder of comparison retailers consist of independent retail units, including a range of clothing, electrical, personal goods and books/arts/crafts shops. In the service sector, there are a number of high street banks, building societies and estate agents, plus a small number of hair salons and a selection of food and drink establishments.

4.29 Outside of the town centre, there are limited further retail facilities in Lydney. The main facility is at Taurus Crafts, which is located to the south-west of the town centre and includes craft, art, food and gardening supplies. There is also the Light Fantastic store on Forest Road, just outside the town centre, which sells DIY, gardening and electrical goods.

Level of Commercial Demand for Town Centre Space

4.30 Whilst there is currently no official retailer interest in Lydney town centre via the Focus Database, if the Council were to actively promote certain sites within the town centre for retail-led redevelopment through the emerging Local Development Framework this could generate some commercial interest in the town centre.

4.31 In terms of the size of retail units that are likely to be desirable, this can vary greater by operator, however, the average size of retail units in Lydney town centre is very small (175sq m). This average size also includes the Tesco, Somerfield and Co-op units which are all larger that the majority of the units in the town and therefore increase the average size. When the Tesco, Somerfield and Co-op units are excluded from the calculation, the average size of retail units in the town centre fall to 33sq m. This size of unit can be suitable for independent retailers, but is less likely to be suitable for national multiple retailers which typically seek larger stores as they often have standardised store formats.

Proportion of Vacant Street Level Property

4.32 Within Lydney town centre there were five vacant units at the time of the survey. This equates to 4.7% of all units in the town centre and is significantly below the national average of 11%. This level of vacancies suggests a healthy demand for retail and commercial space within the town centre, given that, as PPS6 acknowledges, even the healthiest centres have vacant properties. The vacant units are dispersed throughout the town centre, indicating that no one area of the town is suffering from decline. Vacant units are generally small, apart from the former One Stop convenience store unit at the northern end of the town centre, which extends to 500sq m (approx) and has remained vacant for some time. The current state of this unit does not provide an attractive entrance to the town centre from the north and we recommend that the Council should prioritise the improvement of this area of the town centre.

Pedestrian Flows

4.33 As part of our health check for each of the principal Forest towns, we have assessed pedestrian flow surveys undertaken by the Council during October 2007. Within each centre the Council has monitored pedestrian flows in different parts of the centre and the results for Lydney, along with all of the other centres surveyed, can be found at Appendix C. The survey of Lydney found that Newerne Street was the busiest location in the town centre on both a weekday and a Saturday.

Accessibility

4.34 Bus services visiting Lydney link the town to Chepstow and Gloucester with an hourly service running Monday to Saturday and a more limited service on Sundays. The bus station is located at the western end of the town centre on Ham Road and provides an accessible location for town centre visitors.

4.35 Car parking within Lydney town centre is provided at the Newerne Street car park (135 spaces), Forest Road car park (83 spaces) and Bream Road car park (65 spaces). The 2006 Off Street Car Parking Study prepared by RTA Associates concluded that the Bream Road car park has been recently refurbished and is well laid out and sign-posted. Turning to the Newerne Street and Forest Road facilities, the study concluded that Newerne Street is well laid out and provision for the disabled is good, and is generally a busy car park. In contrast, the study found that Forest Road car park is of equal quality but very poorly used despite the linking footpath making it as close to the town centre as the furthest point of the Newerne Street car park.

4.36 There is also limited on-street parking along Newerne Street and High Street, which is very popular and has a high turnover during peak periods.

Customer Views and Behaviour

4.37 From the results of the household survey, 19% of respondents across the whole of the survey area consider Lydney to be their main centre and 91% of respondents from Zone 1 (the zone in which Lydney is located) consider it to be the main centre, with 13% from Zone 7 (outskirts of Gloucester), 11% from Zone 5 (Monmouth) and 9% from Zone 2 (Coleford).

4.38 Of the respondents who chose Lydney as their main town, 47% stated that they liked the convenient location of Lydney. Other positive attributes of Lydney were the selection and choice of shops and the pedestrian friendly environment. In terms of dislikes about Lydney, 18% considered the selection of shops to be poor and 6% commented that the quality of the environment was poor. In terms of suggested improvements to Lydney town centre, 25% of respondents thought an improved choice of shops (both multiples and independents) would improve the attraction of the centre and 9% also highlighted the need to attract larger retailers to the town.

4.39 Lydney lies in Zone 1 of the study area and the household survey results show that facilities in the town are able to retain over three quarters of main/bulk-food shopping trips, along with just under three quarters of top-up food shopping trips. The core shopping catchment of convenience facilities in the town centre extends to Zone 1 only, although the Tesco store is also able to attract significant levels of main food shopping expenditure from the Coleford, Cinderford and outer Gloucester areas.

4.40 In terms of comparison (non-food) shopping, Lydney town centre draws the vast majority of its trade from the local area only (Zone 1), with limited amounts of trade drawn from Coleford and Cinderford and Newent areas. However, only 21% of locally-generated comparison expenditure from Zone 1 remains within Lydney, indicating significant levels of leakage to Gloucester, Cheltenham and Bristol.

State of Town Centre Environmental Quality

4.41 The built environment within Lydney town centre is considered to be reasonably good, with evidence of on-going maintenance and refurbishment of properties. The town centre benefits from a mixture of pre- and post-war buildings, which provide variety and character, although some post-war buildings appear dated. Pedestrian movement throughout the centre is considered to be reasonably good, with good quality pavements and a number of pedestrian crossing points. The high levels of traffic which pass through the centre inevitably causes difficulties for both pedestrian movement and the overall appearance of the centre, although these issues will need to be balanced against the potential economic benefits which some of these visitors bring to the centre. Also in terms of pedestrian movement, there is an opportunity to improve the linkages between the bus station and the core retail area, which at present is separated by car parking and various commercial uses.

Conclusions

4.42 Overall, Lydney is assessed to be a reasonably healthy centre. It has a reasonably good range of shops and services, albeit limited to largely local independent businesses in the comparison sector. It has, by a small margin, the highest number of retail and service units in any of the four main Forest town centre and also has a relatively low vacancy rate, indicating that the centre is popular location. However, there is a need to address the large vacant (former One Stop convenience store) unit at the northern end of the town centre, which does not provide an attractive gateway to the remainder of the centre. Convenience shopping is very well provided for by the Tesco, Somerfield and Co-op stores, which are able to retain significant levels of grocery shopping trips within the town. Lydney is the most popular town centre in the Forest and has, in terms of convenience shopping, the largest catchment area of the four Forest towns. Nevertheless, there remains significant levels of leakage of comparison shopping trips to settlements outside of the District boundary and the household survey informing this study indicates a public desire for improved shopping facilities in Lydney.

Cinderford Town Centre

Structure of the Centre

4.43 The core of Cinderford town centre focuses around the junction of High Street, Market Street, Belle Vue Road and Dockham Road and stretches both north-west and south-east from the junction. The primary retail frontages are around the junction of High Street and Market Street.

4.44 Of all the Forest towns, Cinderford is in the greatest need of revitalisation and is perceived as such by the District Council and other public sector agencies. There is a need for investment, especially in the town centre, and for continued development of employment uses.

4.45 The previous health check assessment for Cinderford, (prepared by Hannah Reynolds Associates) concluded it was in a neutral state of health, where indictors gave cause for some concern about the ability of the town in its present form to fulfil its potential, and to adequately cater for the needs of the catchment population, retailers and investors. The study did not conclude that the town centre was in decline. However, it did establish that the centre was vulnerable, particularly to competition from Coleford and Lydney, as well as to other centres outside the District. Particular features of concern were the poor pedestrian environment, the unattractive wider environment, neglected buildings, high level of vacant premises and pedestrian/vehicle conflict.

4.46 Since the previous health check, the Council has embarked on a regeneration strategy for improving the town centre, as part of a wider Business Plan for improving Cinderford. As part of the business plan, the Council has identified a number of town centre regeneration sites. Some of these sites are already in retail use, however, they have been identified by the Council consultants (Halcrow) for remodelling and redevelopment, which to contribute to improving the town centre environment. The town centre redevelopment options include:

- Merrett's Newsagents, 13 High Street – remodelling of this property to facilitate better pedestrian and vehicle access to the Heywood Road car park
- 'The Swan Block' – large redevelopment area which has the potential to create a link from the town centre through to the Co-op store/proposed Tesco area. This could include a double-sided parade of shops, to provide large units to attract multiple retailers to the town. Part of this site is allocated in the adopted Local Plan for retail and residential uses.
- 'The Spar Block' – remodelling of existing units to provide better linkages and potentially more car parking provision.

- Woolworths/Westgate Stores/Miners Welfare Hall – redevelopment to provide additional housing, improved retail offer and increased car parking provision.

4.47 The options for some of these sites will be discussed in the Site Analysis section of this report.

Diversity of Uses

4.48 Information on the retail composition of Cinderford town centre in 2007 has been provided by Forest of Dean District Council. This survey information provides the following land use composition of the central area of Cinderford:

Table C: Retail Composition of Cinderford, 2007

Sector	No. of Units	%	UK Average %
Convenience	11	11.3	9
Comparison	32	33	46
Service	35	36.1	33
Vacant	15	15.5	11
Miscellaneous	4	4.1	1
Total	**97**	**100**	**100**

Source: Forest of Dean District Council, 2007. Figures may not add due to rounding.

4.49 The proportion of convenience retail units is above the national average at 11% (compared to 9% nationally). Service uses in the town centre are also above the national average (at 36%). However, the proportion of comparison units in the centre is well below the national average, indicating that Cinderford may not be a key destination for comparison shopping trips. Overall, the retail composition of Cinderford would indicate that the town has an acceptable level of vitality and viability for its size and function, but there is scope for improvement, particularly to the range of comparison retailers present in the town.

Retailer Representation

4.50 There is only a limited number of national multiple retailers in Cinderford, including Lidl, Co-op, Woolworth and a Sue Ryder Charity Shop. The retail offer is focused around independent retailers including Westgate Department Store, which is the largest comparison retail unit in the town centre and sells a range home, garden and electrical goods.

4.51 A proposal for a Tesco supermarket on the rugby club site was granted planning permission. However, the permission was subsequently quashed in the High Court. It is understood that Tesco is currently working toward a revised application for the same site. The Tesco proposal is discussed later this report.

4.52 Outside of the town centre, there is a limited amount of additional retail provision, including a large builders merchants (Hales) to the north of Cinderford and a number of quasi-retail premises within the Forest Vale industrial estate.

Proportion of Vacant Street Level Property

4.53 The level of vacant retail properties within Cinderford town centre should be a particular concern to the Council. At the time of survey, the proportion of vacant premises was 15% of the total number of units in the centre and this well above the national average of 11%. The retail strategy put forward later in this report will consider options for tackling the current level of vacancy in the town centre, which reflects the strategies put forward in the Cinderford Business Plan, which looks at improving the commercial attractiveness of the town centre.

Pedestrian Flows

4.54 The pedestrian flow results for Cinderford can be found at Appendix C. The survey found that the area of High Street around the Spar to be busiest area of the town centre, on both a weekday and a Saturday.

Accessibility

4.55 There is a small bus station adjacent to the vehicular entrance of the Co-op store and this accommodates services linking the town centre with regular services to Joy’s Green, Micheldean, Ruardean, Gloucester and Coleford. Most services run on an hourly basis.

4.56 Cinderford town centre current has three shoppers car parks: Heywood Road; Woodside Street; and Belle Vue Road. Heywood Road is the main car park for the town, the study found that this car park exceed capacity by 10am most weekdays, and the use of ‘out of bay’ spaces is now accepted as the ‘norm’ by motorists who occupy these spaces in preference to others even when legal spaces are available. Woodside Street is a small but well used facility. Belle Vue Road experiences fairly consistent occupancy and turnover of the car park is low as the study found most vehicle stay the majority of the day. In addition, there is a car park adjacent to the Co-op store in the town centre which is used by visitors to the Co-op and general town centre visitors. This is also a very busy facility and occupation can reach capacity during peak periods.

4.57 Overall, the level of car parking in the town centre is considered to be low and this is likely to affect the overall attractiveness of the centre to visitors. The Council are currently reviewing the status of the car parks. A key consideration for the Council will be to ensure that the provision of parking around the whole of the centre is balanced, if the proposed Tesco store, with 400+ parking space provision), is permitted. In particular, there is a need for local businesses to the north and south of The Triangle area to have access to more off-street car parking,. It is envisaged that spreading car parking locations around the town centre will hopefully help to encourage more pedestrian permeability through the streets and increase the potential for more linked shopping trips.

Customer Views and Behaviour

4.58 From the results of the household survey, 15% of respondents across the whole of the survey area consider Cinderford to be their main centre. However, 94% of respondents from Zone 3 (the Zone in which Cinderford is located) consider it to be their main centre, with 59% from Zone 4 (North of Cinderford) and 11% from Zone 7 (outskirts of Gloucester). This indicates that Cinderford potentially has a large catchment population.

4.59 Of the respondents who chose Cinderford as their main town, 44% stated that they liked the convenient location of Cinderford. Other positive attributes of Cinderford were the selection and choice of shops and pleasant shopping environment. In terms of dislikes about Cinderford, 19% considered the selection shops to be poor and 8% commented on the difficulty parking. In terms of suggested improvements to Cinderford town centre, 33% of thought an improved choice of shops (both multiples and independents) would improve the attraction of the centre and 10% of respondents highlighted the need for a new supermarket in the town centre.

4.60 Cinderford lies in Zone 3 of the study area and the household survey results show that facilities in the town centre are able to retain 59% of main/bulk-food shopping trips, along with 94% of top-up food shopping trips. The core shopping catchment of convenience facilities in the town centre extends to Zone 3 only, although the Co-op store is also able to attract some main food shopping expenditure from the area north of Cinderford.

4.61 In terms of comparison (non-food) shopping, Cinderford town centre draws the vast majority of its trade from the local area only (Zone 3), with limited amounts of trade from the Coleford and Lydney areas. However, only 22% of locally-generated comparison expenditure from Zone 3 remains within Cinderford, indicating significant levels of leakage to Gloucester, Cheltenham and Bristol.

State of Town Centre Environmental Quality

4.62 The built environment within Cinderford town centre faces a number of challenges, although works have been implemented over recent years to improve the general appearance of the centre. In particular, the Triangle area has been subject to public investment and the public realm has been considerably improved. However, the quality and appearance of some buildings along High Street and Market Street is poor and provides an unwelcoming gateway into the town centre. As with all of the towns in the Forest, Cinderford suffers from high levels of traffic congestion, and this can deter pedestrian movement around the centre. Pedestrian areas within the town centre are also of varied quality, including narrow pavements along parts of High Street and there is potential for improvements to pedestrian linkages with the Co-op store and potential Tesco development site.

In addition, pedestrian access to and from the town centre from the Heywood Road car park is also problematic with pedestrians coming into conflict with vehicles. However, schemes currently being progressed under the Cinderford Business Plan aim to improve this situation by visitors to the town centre received a more pleasant shopping environment.

Conclusions

4.63 Overall, Cinderford possesses the second largest town centre in the District in terms of retail and commercial units and the household survey indicates that the town has the potential to possess a large shopping catchment population. Analysis of the retail composition of the town centre indicates a good level of convenience and service uses, but low levels of comparison retail uses and the highest vacancy rate in the District. As a result, there is significant levels of leakage of comparison retail and main-food retail expenditure from the local area. There are on-going efforts by the public sector to improve the financial performance and quality of the built environment, which are required if Cinderford is to become a more successful and popular shopping destination.

Coleford Town Centre

Structure of the town centre

4.64 Coleford town centre focuses around the Market Place, with the main shopping streets radiating from this central location. The primary retail frontages are around Market Place, along the eastern side of High Street and the main frontage of Pyart Court

4.65 The adopted Local Plan groups Coleford with an arc of adjoining settlements (Christchurch, Berry Hill, Broadwell, Coalway and Milkwall). Together these settlements function as a single catchment area with a population around 10,000 (2005). The adjoining arc of settlements are characteristic of the “Forest Ring”, being aligned along the edge of the statutory Forest.

4.66 The town of Coleford contains an attractive historic core, designated as a Conservation Area, which centres on the Market Place. More recent retail development has taken place to the east of the original commercial core, at Pyart Court, which has produced two somewhat separate shopping areas. This has had an effect on the vitality and viability of the historic core, with the peripheral areas to the Market Place displaying vacant retail units and some lack of investment in the building fabric. In recent years the effect of public investment in environmental and highway schemes in the Market Place and St Johns Street has begun to redress these matters.

4.67 Coleford is located close to the edge of the Wye Valley AONB, the statutory Forest, and to the large camping and caravan sites operated by Forest Enterprise above the Wye Valley. Tourist spending is an important element of income to the commercial enterprises in the town centre, and to the significant number of tourist accommodation and visitor attraction businesses in and near to the town. Tourist spending is specifically accounted for in the quantitative analysis that supports this study.

4.68 The adopted Local Plan allocates two sites within the town centre: at land known as the Marshes (to the rear of the Co-op store) and land to the rear of Kwik Save/Tesco Express stores. Both sites are allocated for Class A1 retail development, with the Marshes site also to include a small number of residential units.

Diversity of Uses

4.69 Information on the diversity of uses within the town centre has been obtained from Forest of Dean District Council survey data. The survey information indicates composition of the centre is as follows:

Table D: Retail Composition of Coleford Town Centre 2007

Sector	2007		UK Average %
	No.	%	
Convenience	8	8.4	9
Comparison	42	44.2	46
Service	38	40	33
Vacant	4	4.2	11
Miscellaneous	3	3.2	1
Total	**95**	**100**	**100**

Source: Forest of Dean District Council, 2007. Figures may not add due to rounding.

4.70 The proportion of convenience units in Coleford is just marginally below the national average at 8% (compared with 9% nationally). The proportion of comparison units in the town is also comparable to the national average, at 44% (compared to a national average of 46%). The proportion of service uses in the town is higher than the national average at 40% (compared to 33% nationally.

Retail Representation

4.71 In terms of retailer representation, Coleford has a large Co-op, which extends to 929sq m net and stocks a moderate range of convenience goods, and limited mix of comparison goods. The store is located close to a large surface level car park, which enables customers to park their vehicles close to the store. The location of the Co-op store within the town centre allows pedestrians to walk between the store and the main retail core, therefore a number of linked trips with the town centre are likely to occur. There is also a small Somerfield store (474sq m net) and a Tesco Express (167sq m net) on the High Street, both selling a range of convenience goods. In addition to the three national operators there are also a number of independent convenience retailers in the town, including butchers, newsagents and healthfood shops.

4.72 In the comparison goods sector, again there is a limited number of national multiple retailers. In addition to the foodstores mentioned above there is only a Lloyds Pharmacy, Sue Ryder Charity Shop and a Cancer Research UK Charity Shop. The remainder of comparison retailers in the town consist of independent retail units, including a range of clothing, electrical, personal goods and books/arts/crafts shops. In the service sector, there are a number of high street banks and building societies, including HSBC and Lloyds TSB, as well as estate agents, plus a small number of hair and beauty salons and a selection of food and drink establishments.

4.73 Outside of the town centre, there is Coleford Garden Centre which sells a wide range of gardening and outdoor furniture supplies, plus EskiMart, which sells food, household and art supplies.

Proportion of Vacant Street Level Property

4.74 Within Coleford town centre there are four vacant units. This equates to 4.2% of all units in the town centre and is below the national average of 11%. This level of vacancies suggests a healthy demand for retail and commercial space within the town centre, given that, as PPS6 acknowledges, even the most healthy centres have vacant properties. The vacant units are dispersed throughout the town centre, indicating that no one area of the town is suffering from decline.

Pedestrian Flows

4.75 The pedestrian flow count results for Coleford can be found at Appendix C. The survey found Market Place to be the busiest area of the town centre, on both a weekday and a Saturday.

Accessibility

4.76 Car parking in Coleford is provided at Railway Drive, which is the main car park for the town , it has a high turnover with the majority of vehicles staying for less than one hour and a high proportion of those for less than 15 minutes. There is usually adequate space at all times of the day but due to the layout and size of the site, spaces are sometimes difficult to locate resulting in vehicles being left in the access roads. Lords Hill car park is also relatively busy throughout the day. Other car parks in the town are Bank Street, Newland Street, and Old Station Way, the later of which was found by the recent RTA car parking study (for the District Council) to be poorly used and has been identified by FODDC as a potential future retail site for the purposes of this study. In addition to these car parks there is on-street parking throughout the town centre.

4.77 The town centre is also services by a number of local bus services, linking the town to Cinderford, Gloucester, Christchurch Lydbrook, Ross-on-Wye and Micheldean, most of these service run on an hourly basis. In addition, one return service runs between Coleford and Hereford on alternate Wednesdays.

Customer Views and Behaviour

4.78 From the results of the household survey, 13% of respondents across the whole of the survey area consider Coleford to be their main centre. However, 89% of respondents from Zone 2 (the zone in which Coleford is located) consider it to be their main centre, with 9% from Zone 4 (area north of Cinderford) and a further 9% from Zone 5 (Monmouthshire).

4.79 Of the respondents who chose Coleford as their main town, 47% stated that they liked the convenient location of Cinderford. Other positive attributes of Coleford were the selection and choice of shops and the easy parking. In terms of dislikes about Coleford, 25% considered the selection of multiple shops to be poor and 6% identified lack of personal safety as a concern. In terms of suggested improvements to Coleford town centre, 34% of respondents thought an improved choice of shops (both multiples and independents) would improve the attraction of the centre and 12% also highlighted the need to attract larger retailers to the town.

4.80 Coleford lies in Zone 2 of the study area and the household survey results show that facilities in the town are able to retain 43% of main/bulk-food shopping trips, along with just over three quarters of top-up food shopping trips. The core shopping catchment of convenience facilities in the town centre extends to Zone 2 only, and none of the town's stores currently attract notable levels of convenience shopping trips from other parts of the survey area.

4.81 In terms of comparison (non-food) shopping, Coleford town centre draws the vast majority of its trade from the local area only (Zone 2), with limited amounts of trade drawn from the Lydney and Cinderford areas. Only 13% of locally-generated comparison expenditure from Zone 2 remains within Coleford indicating significant levels of leakage to Gloucester, Cheltenham and Bristol.

State of Town Centre Environmental Quality

4.82 The centre of Coleford is in a reasonably good state, with good quality pavements throughout the town. The commercial focus around Market Place has been maintained and this provides the market town feel to the centre. To date environmental improvement schemes have been completed in St Johns Street, and in the Market Place. A further scheme has been implemented to improve the pedestrian link between the Market Place and Pyart Court, which is a relatively modern retail development. However, Pyart Court remains somewhat detached from the main shopping core in the town centre, which detracts from the overall attractiveness of the centre and ease of movement around it and there is an opportunity to improve this situation as part of the future development of the town centre.

4.83 Earlier environmental improvement schemes, followed by a Conservation Area Partnership scheme, has resulted in buildings being repaired, refurbished and brought back into use in prominent locations within the town centre. An active partnership scheme has been established representing all town centre interests, and there is an agreed strategy and action plan for the town centre. The District Council has allocated substantial capital and revenue resources to the above schemes, supported by other agencies and the private sector. Particular schemes include:

- Extending the Market Place improvements into Newland Street and High Street;
- Designing and implementing environmental improvements to the Bank Street area and the junction of Gloucester Road/Lords Hill;
- Promoting new retail development at the Marshes and to the rear of the Co-op;
- Considering an alternative access to the town centre car parks to enable traffic management to be introduced on High Street
- Providing grant aid for building refurbishment in the historic core of the town.

Conclusions

4.84 Overall, Coleford is considered to be a healthy centre, which caters well for local residents. The range of shops and services available in the centre is generally consistent with the national average in terms of the proportions of individual uses, although service uses are noticeable higher than the national average. Vacancy levels are low, which is a sign of a reasonably healthy centre which is attractive to occupiers. The results of the household survey indicate that the town centre is only able to retain around one seventh of local comparison retail shopping trips and just over 40% of main food shopping trips. These levels of retention indicate that the centre is not particularly attractive to local residents for a wide range of shopping, although the comparison shopping retention rate is generally consistent with the other Forest towns. The town centre has an attractive environment, although the separation of the core retail area from Pyart Court is a clear disadvantage which the District Council should concentrate on rectifying over the lifetime of the LDF.

Newent Town Centre

Structure of the Centre

4.85 Newent town centre is broadly ‘L-shaped’, with the main town centre uses running along High Street, Broad Street and Church Street. The primary retail frontages, within the adopted Local Plan, are concentrated on Broad Street.

4.86 Newent is situated in the northern part of the District and is close to Gloucester, Cheltenham, Ross-on-Wye, Ledbury and Tewkesbury. The population of Newent is approximately 4,700 (2005) making it the smallest of the four principal towns within the Forest of Dean District. The town acts as a local service centre for a catchment area consisting of villages to the north of the A40. Alongside its market town role as a service centre, the town of Newent acts as a focus for tourism within the Forest of Dean.

4.87 Newent performs well as a locally orientated shopping centre, providing good top-up shopping facilities for the north Forest. Due to the close proximity of Gloucester (plus Ross-on-Wyre and Hereford) and the retail competition this creates, Newent is unlikely to attract significant new investment in comparison shopping, except in relation to tourism which is a valuable contribution to the town's trade. The quality of the built environment of the town centre is a significant attraction for both businesses and shoppers.

Diversity of Uses

4.88 Information on the diversity of uses within the town centre has been obtained from the Forest of Dean District Council. This information indicates the composition of the centre is as follows:

Table E: Retail Composition of Newent, 2007

Sector	2007		UK Average %
	No.	%	
Convenience	10	14.5	9
Comparison	23	33.3	46
Service	31	44.9	33
Vacant	5	7.2	11
Miscellaneous	0	0	1
Total	**69**	**100**	**100**

Source: Forest of Dean District Council, 2007. Figures may not add due to rounding.

4.89 The above analysis indicates that the retail composition of Newent town centre is noticeably different to the UK average. Rural service centres do not necessarily perform the same retail function as larger towns and therefore this difference in the function and role of the town will inevitably be reflected in the retail and service composition of the town. The proportion of convenience units in Newent is well above the national average. The proportion of comparison units in the town is well below the national average, which (as noted above) maybe a direct result of the town's size and function within the retail hierarchy. Newent is also close to Gloucester, which will no doubt attract a significant number of comparison shopping trips from the local area. The proportion of services in the centre is well above the national average and dominated the town centre, however as a rural service centre this is in keeping with Newent role and function.

Retail Representation

4.90 In terms of retailer representation, Newent has Costcutter, Co-op and Budgens stores, the later of which is the main foodstore in the town centre and extends to 615sq m net and stocks a moderate range of convenience goods and a limited mix of comparison goods. The Co-op and Costcutter stores are much smaller and provide for a top-up convenience shopping function. In addition, there are a number of independent convenience retailer in the town including confectioners, newsagents, butchers, delicatessen, healthfoods, greengrocers and small general stores. Overall, for a town of its size, the range of convenience stores in Newent is considered to be good and may well be a product of the lack of a large foodstore within the town.

4.91 In the comparison goods sector, there are no national multiple retailers and there are a number of specialist and niche retailer (selling gifts and craft, among other items) and within the service sector there are Barclays Bank, Lloyds TSB and Halifax units. The remainder of the retailers and services in the town are independent businesses.

4.92 Outside of the town centre, there are a couple of large garden centres to the north of the main urban area. These store have traditionally sold gardening and outdoor products, although recent refurbishment has led to a widening in the range of products sold (to including homewares and household goods).

Proportion of Vacant Street Level Property

4.93 Within Newent town centre there are five vacant units. This equates to 7.2% of all units in the town centre and is below the national average of 11%. Newent does have the second highest vacancy rate in the District (after Cinderford), however, this is still less than half the vacancy rate of Cinderford, which is currently 15.5%. The other two centres of Lydney and Coleford benefit from low vacancy rate of between 4-5%. The vacant units in Newent are dispersed throughout the town centre, indicating that no one area of the town is suffering from commercial decline.

Pedestrian Flows

4.94 The pedestrian flow count results for Newent can be found at Appendix C. The survey found Broad Street to be the busiest location in the town centre on both a weekday and a Saturday.

Accessibility

4.95 Car parking in the town centre is provided in a mixture of off and on-street facilities. Studies undertaken for the recent Newent Environmental Enhancement study indicate that Newent has a sufficient level of parking provision to accommodate current demand. The main off-street parking facilities are located at Lakeside North and Lakeside South, adjacent to the Library, as part of the Budgens store and the Memorial Hall. On-street parking is provided for through the centre. The Newent Environmental Enhancement Study indicated that pedestrian movement around Newent town centre has a number of constraints including narrow footpaths and lack of formal crossing facilities. Traffic speeds and the high level of vehicle numbers within the town centre are also seen as a disadvantage to both pedestrian movement and environmental quality.

4.96 The town is visited by local bus services, including an hourly service to Ross-on-Wye and Hereford. One return service to Gloucester also runs each Tuesday and Friday.

Customer Views and Behaviour

4.97 From the results of the household survey, 13% of respondents across the whole of the survey area consider Newent to be their main centre and 74% of respondents from Zone 8 (the zone in which Newent is located) consider it to be their main centre, with 33% from Zone 7 (outskirts of Gloucester) also considering Newent as their main centre.

4.98 Of the respondents who chose Newent as their main centre, 45% stated that they liked the convenient location of Newent. Other positive attributes of Newent were the selection and choice of shops and the pedestrian friendly environment. In terms of dislikes about Newent, 7% considered parking in the centre as difficult and 5% identifying the selection of multiple shops as poor. In terms of suggested improvements to Newent town centre, 11% of respondents thought an improved choice of shops (both multiples and independents) would improve the attraction of the centre, whilst 6% identified the need for additional car parking spaces.

4.99 Newent lies in Zone 8 of the study area and the household survey results show that facilities in the town are able to retain only 30% of main food shopping trips, along with 77% of top-up food shopping trips. The core shopping catchment of convenience facilities in the town centre extends to Zone 8 only, and no additional convenience shopping trips are attracted from elsewhere in the study area.

4.100 In terms of comparison (non-food shopping, Newent town centre draws the vast majority of its trade from the local area only (Zone 8), with only a very small amount of trade drawn from Coleford. However, only 10% of locally-generated comparison expenditure from Zone 8 remains within Newent, indicating significant levels of leakage to Gloucester city centre in particular.

State of Town Centre Environmental Quality

4.101 Arguably Newent's most striking characteristic is the historic townscape of its core. The town centre has a wealth of traditional and vernacular buildings, many of which date from the 17th-19th centuries. The traditional architecture is coupled with an historic street pattern, including an historic market square. However, in places, this historic environment is let down by poor maintenance and treatment of buildings and derelict sites.

4.102 In February 2002, Newent was awarded funding by the South West Regional Development Agency and the Gloucester Market Towns Forum, as part of the national Market and Coastal Towns Initiative, to prepare a Community Strategic Plan. The aim of the plan is to provide a framework for detailed consideration of the issues that the town will face in ensuring its economic vitality and sustainability for years to come. The Community Plan targets the economy, social and community issues, transport and accessibility and the environment as key issues and has led to a Newent Environmental Enhancement Study being prepared. The study has 10 objectives:

- Make significant improvements to the quality if key town centre spaces and to the setting of historic buildings.
- Significantly improve general pedestrian amenity and comfort in the town centre, as well as on pedestrian footpaths to outlying residential areas.
- Create more town spaces that can be used flexibly for markets and a variety of events.
- Maintain levels of parking throughout the town whilst contributing to an improvement in parking management.
- Take steps to ease congestion.
- Create a sequence of attractive, characteristic an intriguing spaces and street throughout the central are of the town, which link the Lakeside, car park and historic core.
- Identify opportunities to improve existing frontages in the historic core of the town.
- Plan derelict and underused sites for development that reflects the traditional character of the town and the traditional, positive relationship between building and street.
- Identify opportunities for community facilities to remain and expand in the heart of the town.

4.103 The enhancement study identified four areas where further improvements should be directed:

- Market Square: environmental enhancements to Broad Street, Church Street and Bury Bar Lane, plus redevelopment of the memorial hall site
- Court Lane: redevelopment of the Shambles area and properties to the rear of High Street to provide residential, retail and craft units, along with the redevelopment of the former Bennions site
- High Street & Lakeside: redevelopment of the existing library site for community uses and residential accommodation, plus reorganisation of the Lakeside car parking area.
- Church Street: residential development to be provided on land to the south of Church Street.

Conclusions

4.104 Newent is the smallest town centre in Forest of Dean District in terms of the number of retail and commercial units and serves a rural hinterland in the north of the District. General shopping provision in Newent is limited, with the centre possessing a below (national) average proportion of comparison retail units and an above average proportion of convenience and service units. Vacancies in the centre are below the national average at 7%, although are the second highest of the four centres covered by this study. The centre has a very attractive historic core, which is a benefit for the centre and plans put in place by the Newent Environmental Enhancement study in recent years aim to improve the range of uses and public realm within the centre. Only one tenth of local people remain within Newent for main food shopping trips (the lowest level of the four towns) and Newent is also not very successful in retaining main food shopping trips (which are leaking to settlements outside of the District). Overall, Newent is considered to be a reasonably healthy centre, albeit one which is only able to serve part of the needs of its limited catchment population.

5. ASSESSMENT OF NEED FOR ADDITIONAL RETAIL FLOORSPACE IN THE FOREST OF DEAN DISTRICT

Overview

5.1 This section assesses the need for additional retail floorspace within Forest of Dean District over the life span of the Local Development Framework. It draws upon quantitative and qualitative indicators of need, as recommended by national planning policy guidance. The quantitative analysis has drawn upon an up-to-date survey of household shopping patterns and has estimated future convenience (food) and comparison (non-food) capacity (in financial and floorspace terms) on the assumption that existing shopping patterns will remain the same over the life span of the LDF (taking into account the impact of any existing retail commitments or developments currently under construction). On the basis of this constant market share scenario, of the four principal towns in the Forest of Dean, Cinderford has the highest amount of additional convenience (food) retail capacity over the LDF period. In terms of comparison (non-food) shopping, Lydney and Cinderford have the highest level of future capacity. Some comparison floorspace capacity is also identified for the other centres (Coleford and Newent, however, this is only 652sq m and 609sq m by 2021 respectively). It should be noted that the capacity estimates outlined in this section are only the first stage in the overall assessment of need; and qualitative considerations of need, plus retail impact and locational issues, are also taken into account within a policy options analysis in the next section of this report in order to determine an appropriate retail strategy for each settlement.

5.2 In relation to qualitative indicators of need, this section has found that Coleford, Cinderford and Newent are all have opportunities for improved convenience (food) shopping facilities, particularly a store which is better able to meet the main/bulk-food shopping requirements of local residents. Lydney has a good range of existing large supermarkets and there are not any significant qualitative deficiencies in the town. Within the comparison retail sector, there is a general qualitative need across the District to improve provision, in order to stem the significant levels of leakage to Gloucester, Cheltenham and other administrative areas.

Introduction

5.3 A key element of the evidence base for the Forest of Dean Local Development Framework prepared by FODDC is the assessment of need and capacity for additional retail development in the Forest of Dean District. PPS6 (2005) notes that need assessments for a development plan document period should be carried out as part of the plan preparation and review process, and updated regularly. Local need assessments carried out by local planning authorities should take account of the strategy for the region's centres set out in the Regional Spatial Strategy, as well as the catchment areas of each of their centres outside their boundaries which extend into their area, rather than merely focusing on centres within the authority's administrative boundaries. It is also considered that the assessment of need will play an important role in determining the appropriate scale of development in particular centres and also when reviewing all existing allocations for retail development.

5.4 In the analysis which follows, quantitative and qualitative factors are considered in turn, both of which form the basis of more detailed assessment of need, and securing the appropriate scale of development in particular centres, through the life of the Forest of Dean LDF.

Quantitative Need

Introduction

5.5 In this section we establish the current performance of town centre and out-of-centre retail provision in the Forest of Dean, as the basis for a forecast of the need for further retail floorspace to the period 2021. The quantitative analysis statistical tables accompanying this assessment are attached at Appendix D.

5.6 We have used a conventional, widely accepted step by step methodology which draws upon the results of the Forest of Dean Shopping Survey of existing shopping patterns to model the existing flow of expenditure for each retail destination. In the analysis which follows we have used the following step by step approach:

- Step 1: Definition of an appropriate geographical area of analysis for the quantitative assessment, hereafter know as the Study Area.
- Step 2: Calculate the current (2007) population and expenditure available within the Study Area and forecast future population and expenditure growth over a specific period. In this instance, we have used the period up to 2021.
- Step 3: Calculate the levels of convenience with comparative expenditure flowing to stores and centres within the Study Area, using a market share analysis, based on the results of the Forest of Dean Shopping Survey undertaken by NEMS Market Research.
- Step 4: In order to assess the quantitative need for additional retail floorspace, we have used a market share approach. This involves the assumption that retail floorspace within towns in the Forest of Dean District and the other town centres will achieve a particular market share of available retail expenditure within the study area as a whole. This assessment is able to model changing forms of retail provision, including possible increases within or decreases in trade or follow the implementation of committed retail schemes.

5.7 In the analysis which follows, the following assumptions and data sources have been used:

- All monetary values have been indexed to 2004 prices.
- Having regard to best practice, the assessment has been carried out on a goods basis, rather than a business basis. This method of assessment matches guidance contained within PPS6.
- Data on current shopping patterns has been derived from the Forest of Dean Shopping Survey 2007 (contained at Appendix B).
- The Study Area for the assessment has been set to match the Forest of Dean Household Survey Area. However, a small allowance has also been made for net inflow of expenditure into the Study Area, which is described in more detail later in this section.
- Population for the Study Area has been derived from Experian Business Strategies data, which is based on the results of the 2001 Census and projected forward using data provided by the Office of National Statistics (ONS) and Gloucestershire County Council predictions.
- Per capita retail expenditure for convenience and comparison goods has been derived from a series of retail planning reports provided by EBS and projected forward using information within the EBS publication Retail Planner Briefing Note 5.0 (October 2007). Information from these documents provides expenditure based on local circumstances with local socio-economic characteristics. Account has also been taken of special forms of trading within the survey area and expenditure estimates. The special forms of trading sector includes sales from mail order companies, sales from the internet, market stalls and sales direct from the producer and manufacturer and out allowance for this type of shopping takes account of likely increases in this sector over the lifetime of the assessment. The proportion of expenditure attributed to special forms of trading outlined in the notes to Table 2 (Appendix D).
- When assessing the current trading performance of existing convenience retail facilities, reference has been made to convenience goods company average sales density figures within Retail Rankings 2008 edition and Verdict Research, with the effect of utilising company performance data for the financial year 2006/2007, this being the latest available year. Estimates of company performance take into account non-store sales, where applicable.
- The quantitative assessment examines retail capacity over the period 2007 to 2021 including interim projections at 2012 and 2016.
- All of the statistical tables referred to in the quantitative assessment are contained at Appendix D.

Study Area Definition, Population and Expenditure Estimates

5.8 In order to provide detailed factual information on shopping patterns in and around the Forest of Dean District, a new household interview survey covering 800 households was commissioned. GVA Grimley designed the survey questionnaire in consultation with Forest of Dean District Council officers and NEMS Market Research, who undertook interviewing and data processing. The area for the household survey has been set to cover the Forest of Dean District and parts of surrounding districts to ensure that all potential regular users of retail facilities in the Forest of Dean towns are included within the survey. The survey area has been based on postal sectors. The survey area is shown on the plan attached at Appendix A and has been organised to allow each of the principal Forest of Dean towns to be contained within an individual zone.

5.9 The survey results identify shopping patterns for households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove responses such as internet or mail order shopping. For convenience goods, the household survey includes questions on main food and top-up shopping.

5.10 The survey also includes seven questions on specific comparison goods types which coincide with Experian Business Strategies definitions of comparison goods expenditure. Comparison shopping patterns are split up in to the following sub-categories:

- Clothing, footwear and other fashion goods.
- Furniture, floor coverings and textiles.
- DIY and hardware products.
- Domestic appliances
- Smaller electrical products.
- Personal and luxury goods.
- Recreational goods.

5.11 As noted within the previous section, the Study Area has been broken down into 8 constituent zones, based on postcode sector areas. Population projections for these 8 zones are contained at Appendix D, Table 1.

5.12 Population data has been obtained from Experian Business Strategies at the postcode sector level and has been projected forward on the basis of the following information and assumptions:

- Zones 1, 2, 3, 4, 7 and 8 of the study area broadly fall within the Forest of Dean District administrative boundary. Data from the latest Gloucestershire County Council population projections indicates an increase of 270 persons per annum in the Forest of Dean District up to 2021 and, therefore, we have applied this projected growth rate for Zones 1-4 and 7 and 8. For Zones 5 and 6 we have relied upon population projections from EBS.

- Once the District-wide population growth rate has been set, we have then considered how the growth should be apportioned between Zones 1-4 and 7 and 8. Using dwelling led forecasts from Gloucestershire County Council, we have split the global growth rate between individual settlements.
- Information on the District-wide growth rate and apportionment of this rate between individual settlements is clearly set out in the notes to Table 1 at Appendix D. Should housing growth patterns change in the future then this analysis can be easily amended.

5.13 In Table 2, the per capita expenditure figures obtained from EBS are broken down into convenience and various sub categories of comparison goods. For each goods category account has been taken of special forms of trading (internet, catalogue and mail order shopping) and future growth and expenditure (per annum), both of which are derived from the latest guidance published by EBS in October 2007. Individual rates for future projections and special forms of trading are contained in the notes to Table 2. It should be noted that the expenditure projections provided by EBS are for the period up to 2015. However, in the absence of further long term projection data, we have also applied these projections to the period 2015 to 2021 and therefore expenditure and turnover projections post 2015 should be treated with a degree of caution. Indeed, it would be appropriate, in any event, to review these expenditure figures of part of a wider review of the retail study at regular period and we recommend reviews after every five years, in line with the guidance provided in PPS6 (2005).

5.14 By combining the population of per capita expenditure rates, Tables 3a to 3g set out the total retail expenditure within the study area by goods type. Table 3a estimates that convenience retail expenditure within the study area is expected to grow by £17 million over the period of 2007 to 2012. Between 2007 and 2021, convenience expenditure within the study area will grow by £52 million. In relation to total comparison goods expenditure in the study area, Tables 3b to 3g indicate a current level of £376m at 2007, which will rise to £470 million by 2012 and £714 million by 2021.

Existing Flows of Retail Expenditure

5.15 The next stage of the quantitative assessment is to estimate current flows of retail expenditure within and surrounding the Forest of Dean District. Separate flows for convenience and comparison retail expenditure are provided and seven sub-categories of comparison goods expenditure have also been examined (to match the questions used within the Forest of Dean Shopping Survey).

5.16 Table 4 and 5 at Appendix D set out the current market share and turnover of convenience goods retail facilities in each of the settlements, indicating the level of expenditure which is drawn from each of the 8 survey zones to the different towns. When analysing convenience shopping habits, the household survey has obtained patterns of main food and top-up food shopping and applied these to available convenience goods expenditure within each zone. In order to gain the most accurate estimate of expenditure flows, the proportion of total convenience goods expenditure flowing to main and top-up food shopping destinations has been weighted for each zone according to the results from Question 5 of the Forest of Dean Household survey. Table 5 indicates the amount of convenience goods expenditure that facilities in each of the town centres currently attract per annum, and splits this between the individual stores. The analysis at Table 5 indicates the amount of turnover which is derived from both main food and top-up shopping trips.

5.17 The table below sets out the current market share of the principal Forest of Dean towns within the study area.

Study Area Market Shares for Convenience & Comparison Shopping in the Forest of Dean

Town	Study Area Market Share - Convenience	Study Area Market Share – Comparison
Lydney	16.1%	3.5%
Cinderford	8.6%	2.7%
Coleford	5.6%	1.8%
Newent	5.9%	1.4%

Source: Appendix D

5.18 Table 5 provides the following information regarding the flows of convenience goods expenditure in and around the principal settlements in the Forest of Dean District *(n.b. the figures given below are turnover levels derived from the study area and further allowance may need to be made in order to estimate the total turnover of individual centres):*

- Lydney has a convenience goods turnover of £34.7m, the majority of which (£25m) flows to the Tesco store. This is the highest level for any centre in the Forest of Dean District and confirms the popularity of Lydney for convenience shopping. The local/independent stores in the town centre are assessed to have a combined turnover of £0.5m. Elsewhere, the Somerfield has a turnover of £5.5m and the Co-op has a turnover of £3.7m. Lydney lies within Zone 1 of the study area and the majority of convenience expenditure flowing to the town (71%) is derived from this area. However, stores in Lydney, primarily the Tesco, are reasonably successful in attracting expenditure from the Coleford area (Zone 2 of the Study Area). All of the convenience expenditure attracted by local/independent stores in

Lydney town centre is spent on top-up food shopping trips, with the reverse true for the Tesco store which is clearly a main/bulk food shopping destination.

- Table 5 indicates that Cinderford has an annual turnover of £18.5m, just over two thirds of which is draw from Zone 3 (the zone in which Cinderford in located). The Co-op has a turnover of £13m and the Lidl store has a turnover of £4.3m. Almost 40% of the convenience expenditure flowing to Cinderford is spent on top-up food shopping.
- Convenience facilities in Coleford have an annual turnover of £12.1m. This is the lowest level of the four principal centres and confirms the limited convenience offer available in Coleford, particularly when compared to both Lydney and Cinderford. 88% of this turnover is derived from Zone 2 (in which Coleford sits), with the majority of the remainder being drawn from the Lydney and Cinderford zones. The most successful store is the Co-op store with an annual turnover of £6.1m (or 50% of the total amount of convenience expenditure flowing to Coleford as a whole). The Co-op store is the dominant main/bulk-food shopping location, followed closely by the Somerfield store, which has a turnover of £4.0m.
- Newent currently attracts £12.8m of convenience goods expenditure, making it the second smallest centre in terms of convenience expenditure flows. The main store is the Budgens which has a turnover of £7.8m and currently attracts 61% of the total convenience expenditure spent in the town centre. The local/independent stores in the town centre have an annual convenience turnover of £4.7m, the majority of which is attracted from Zone 8 (the zone in which Newent sits) and is mainly top-up food shopping expenditure.

5.19 In relation to comparison goods shopping habits, Tables 6 – 12 at Appendix D set out the market penetration rates of existing facilities in the different towns by individual types of comparison goods. Each of these tables then converts the market penetration rates into levels of expenditure flowing to each town centre. Using the results of the Forest of Dean household survey, flows of expenditure within the clothes and shoes, furniture and carpets, electrical, DIY, personal, luxury and recreational goods categories have been examined. We have examined individual types of comparison goods in order to ensure that particular nuances of shopping patterns in and around the individual towns are fully incorporated into the quantitative assessment. For example, the different towns within the District are likely to possess differing roles depending on a number of factors, including: their size, geographical position in relation to other settlements, their influence from tourism and the current size of their retail offer.

5.20 By amalgamating flows of expenditure for individual types of comparison goods given in Tables 6 - 12 at Appendix D, Table 13 provides a study area derived comparison goods expenditure for each town in the Forest of Dean and the amount of expenditure attracted from individual zones. The study area derived turnover data contained within Tables 6-13 at Appendix D can be summarised as follows:

- Lydney has a study area comparison goods turnover of £13.1m, which is drawn primarily from Zone 1. This is the highest level of comparison turnover in the District, highlighting Lydney's role as a principal shopping centre throughout the District as a whole. 28% of this turnover is derived from expenditure on personal and luxury goods, with further significant contributions made from TV,HI-FI, Radio, photographic and computer goods and recreational goods shopping trips. Lydney town centre has a comparison sales density of £4,250/sq m (the amount of turnover attracted by the centre divided by the level of existing comparison retail floorspace).
- Cinderford has an annual comparison study area derived turnover of £10.1m, the majority of which is drawn from the local area (Zone 3). 26% of this turnover is derived from expenditure on personal and luxury goods, with further contributions made from DIY and TV,HI-FI, Radio, photographic and computer goods shopping trips. Cinderford town centre has a comparison sales density of £6,000/sq m, which is the highest in the District.
- Coleford has a moderate study area derived comparison goods turnover of £6.7m, which is drawn from all the study area Zones, with the exception of Zones 6 and 7. Over two thirds of the turnover is derived from Zone 2 (where Coleford sits). 31% of this turnover consists of furniture expenditure. Overall, comparison retail provision in Coleford has a sales density of £2,750/sq m, which is the lowest in the District and at the lower end of expectations for this type and size of town centre.
- Newent town centre derives £5.4m of comparison goods expenditure from the study area, 80% of which (£4.3m) is drawn from the local area in Zone 8. This is the lowest level of comparison turnover of the four principal towns in the Forest, which emphasises Newent's role as a local rural service centre, rather than a principal shopping centre for the District. The highest level of spending in Newent (£2.2m goes on personal and luxury goods and in contrast, nothing is spent on TV, HI-FI, Radio, photographic and computer goods. Overall, comparison retail provision in Newent has a sales density of £4,500/sq m, which is considered to be a reasonably goods performance for this centre.

Assessment of Baseline Quantitative Need

5.21 Following the establishment of current convenience and comparison store turnovers within each settlement, our quantitative assessment can move forward to the assessment of future retail floorspace capacity. The capacity analysis is presented at Table 15 and 16 at Appendix D and the data contained therein is derived from the previous tables, in particular total available expenditure (Table 3), resident study area derived expenditure for existing convenience and comparison facilities in each of the towns (Tables 5 and 13) and benchmark turnover of existing convenience facilities (Table 14).

5.22 Capacity arises from the difference between expenditure ‘flowing’ to a centre from within and beyond a catchment area (the total turnover or turnover potential), minus benchmark turnovers calculated on the basis of retail company averages.

5.23 Benchmark turnovers are the turnovers which individual facilities could be expected to achieve if they conform to their respective national average company performance. The benchmark turnover levels in Table 14 for individual large convenience operators have been derived from a combination of data and research within Retail Rankings (2007 Edition, published by Mintel) and research data published by Verdict on grocery operators. Where individual benchmark performance levels are not known (e.g. local independent convenience operators) we have applied an average benchmark sales density which is, in our opinion, broadly reflective of retail facilities of this size and type. It should be made clear from the outset that where individual store performances are not known, benchmark levels are our own assumptions. Nevertheless, taking this situation into account, a comparison between Tables 5 and 14 provides an indication of whether individual stores are either overtrading or undertrading[4] and the current financial performance of centres as a whole. The trading performances of the key supermarkets in the Forest of Dean is shown in the table below.

Overtrading/ Undertrading of Main Convenience Stores in the Forest of Dean, 2007

Store	2007 Study Area Derived Turnover (£m)	Overtrading (+) / Undertrading (-)
Tesco, Lydney	£25.0m	+30%
Somerfield, Lydney	£5.5m	-7%
Co-op, Cinderford	£12.9m	+77%
Co-op, Coleford	£6.1m	+45%
Somerfield, Coleford	£4.0m	+29%
Budgens, Newent	£7.8m	+77%

Source: Appendix D

5.24 In relation to expenditure inflow, we have made an assessment for each centre based on a number of factors: the size of the centre and its retail composition, its likely position and attractiveness in the sub-regional tourism market, plus the contents of a survey undertaken by South West Tourism in relation to expenditure by tourists in the Forest of Dean District. The South West Tourism data indicates that in 2003 all tourists spent around £19.7m on shopping in the Forest of Dean District. We have translated this base figure into a 2007 based estimate and sub-divided it into convenience and comparison retail expenditure. We then make assumptions about where this expenditure will be flowing, based on the factors outlined above. The expenditure inflow estimate for each centre is clearly shown on the accompanying quantitative need tables.

[4] Overtrading occurs where the turnover of a particular store is above the assumed benchmark turnover for that facility

5.25 Within the quantitative need analysis which follows, we have assessed the future retail capacity for convenience and comparison in the principal towns (Lydney, Cinderford, Coleford and Newent).

5.26 A convenience goods quantitative need assessment for each of the principal centres are shown at Tables 15a – 15d and the comparison goods assessments are contained at Tables 16a – 16d. A common format is adopted and shows the following information:

- The total level of available retail expenditure within the study area;
- The level of expenditure which each centre attracts from the study area;
- The market share of each centre within the study area
- The level of expenditure inflow attracted by each centre;
- The total turnover of convenience or comparison facilities in each centre, which is a combination of resident's spending derived from the study area plus trade inflow from beyond.
- The benchmark turnover of existing retail facilities in each settlement; and
- A residential expenditure estimate which is the difference between the total turnover flowing to retail facilities in a particular settlement between 2007-2021 and the benchmark turnover of those facilities.

5.27 The market share of existing facilities at 2007 within a particular settlement is calculated by comparing the total expenditure levels in Table 3 with convenience turnover levels given in Table 5 or comparison turnover levels in Table 13. It is the proportion of residents' spending attracted from the study area relative to total available expenditure. In other words, it is an aggregate figure derived from zonal market penetration rates. Moving forwards to 2012-2021, we have in the first instance assumed that the market share for convenience and comparison goods shopping in each key settlement remains constant unless there is retail commitment (e.g. extant planning permission or development under construction) which has the potential to affect shopping patterns in individual centres in the Forest of Dean.

5.28 However, it should be noted that this baseline quantitative analysis is only the starting point for the assessment of quantitative need for additional retail floorspace in the Forest of Dean and further changes to the market share of convenience and/or comparison shopping in a particular town may be warranted as a result of the policy options analysis contained within the next section of this report.

5.29 Towards the bottom of each quantitative need analysis table a residual expenditure figure is provided. Where the residual figure is a positive number, this indicates that a quantitative need potentially exists for additional retail floorspace. Conversely, a deficit (minus figure) indicates that there is a potential oversupply of existing retail floorspace. Where a surplus level of expenditure exists, Tables 15a – 15d convert the residential expenditure level into a floorspace equivalent. In order to accomplish this task an average sales density is used. For convenience goods shopping, a sales density of £10,000/sq m at 2007 is used (projected forwards over the period 2007-2021 assuming annual increases in floorspace efficiency in line with existing retail floorspace). For comparison goods, a density of £5,000/sq m is used (and again project forward over the period 2007-2021 assuming increases in floorspace efficiency). Both of these sales densities are averages and retail performances of individual operators can vary, particularly for convenience goods operators. For example Asda and Tesco and other larger grocery operators have sales densities in excess of £10,000 per square metre. In contrast, smaller discount operators such as Lidl and Aldi have sales densities below £5,000 per square metre. In addition, extensions to existing retail facilities also have individual specific sales density requirements which may, in certain circumstances, be below the normal sales density for a particular operator. Therefore, the sales density figure for new retail floorspace should only be used as a guide and reference should also be made to the residual expenditure figures when the District Council are faced with individual planning application proposals.

5.30 In addition to existing floorspace, there is a planning permission for a new DIY store on Steam Mills Road in Cinderford. The store, which gained planning permission in 2007 and has not yet been built, extends to 2,325sq m gross plus a 900sq m external garden centre sales area. A suitable likely turnover for this store has been included within the comparison goods capacity table for Cinderford and the comparison shopping market share of the town (post-2012) has been amended in line with the trade diversion pattern predicted by the applicant. Given that some of the new store's trade will be drawn from Lydney and Coleford, we have also amended the future market share of these centres to account for the impact the new store.

Quantitative Need Assessment of the Individual Towns

5.31 On the basis of the above standard (constant market share) methodology, we set out below the results of the quantitative assessment for each centre:

- Lydney. On the basis of this market share, the analysis at Table 15a indicates a small surplus of £1.3m of convenience goods expenditure which, assuming a constant market share over the period 2007-2021, will translates into a floorspace capacity of 131sq m at 2007, rising to 624sq m net capacity at 2021. For comparison shopping, a constant market share of 3.3% (taking account of the Cinderford DIY commitment) provides a current floorspace capacity of 232sq m by 2012 rising to 1,044sq m net of comparison capacity by 2021.
- Cinderford. Assuming a constant market share for convenience shopping in Cinderford (based on 8.6% current market share) our analysis predicts a floorspace capacity of 743sq m net by 2012, rising to 823sq m net by 2016 and 925sq m net by 2021. For comparison

shopping, Cinderford has a current market share of 2.7% in the study area which will rise to 3.7% as a result of the DIY store commitment. Going forwards, this increased market share (held constant between 2012-2021) will provide a future comparison goods capacity of 220sq m net by 2012, 499sq m net by 2016 and 1,107sq m net by 2021.

- Coleford. At present, convenience shopping facilities in Coleford have a study area market share of 5.6%, equating to a total turnover of £13.5m (including expenditure inflow). This is slightly higher than the benchmark turnover of existing convenience facilities, indicating a potential current quantitative need of 182sq m net. Taking a constant market share approach, the future capacity figures are calculated at 247sq m net by 2012, 302sq m net by 2016 and 370sq m net by 2021. We have also assumed that comparison shopping in Coleford will maintain a constant market share of 1.7% (following trade diversion to the Cinderford DIY commitment). Based on this assumption, there will limited future capacity, in the order of 173sq m net by 2012, 326sq m net by 2016 and 652sq m net by 2021.
- Newent. At present, convenience shopping facilities in Newent have a study area market share of 5.9%, equating to a total turnover of £14m (including expenditure inflow). This is notably higher than the benchmark turnover of existing convenience facilities, indicating a potential current quantitative need of 414sqm net. Taking a constant market share approach, the future capacity figures are calculated at 481sq m net by 2012, 539sq m net by 2016 and 610sq m net by 2021. We have also assumed that comparison shopping in Newent will maintain a constant market share of 1.4% (the lowest market share of the principal towns). Based on this assumption, there will be very limited future, in the order of 186sq m net by 2012, 318sqm net by 2016 and 609sq m net by 2021.

Qualitative Need: Identification of Areas of Deficiency

5.32 In terms of the overall assessment of need, the consideration of qualitative factors remains an important contributory element, although the weight attached to this indicator is (in principle) less than quantitative factors. Nevertheless, whilst an assessment of the growth in retail expenditure in the study area can show the levels of expenditure available to support additional retail floorspace in the Forest of Dean District, the case for additional provision also relates to providing a good distribution of locations, to improve accessibility for the whole community, and consumer choice is enhanced by making provision for a range of shopping facilities, which allow genuine choice to meet the needs of the entire community. Accordingly, in the assessment that follows, we have considered the following range of indicators:

- Our own qualitative assessment of the range of retail facilities within the Forest of Dean District, examining the distribution of locations and access to the whole community;

- Existing shopping patterns of local residents for convenience and comparison goods; and
- The views of local residents in relation to current and future retail provision.

Lydney

5.33 Lydney is the largest retail centre in the District and possesses the largest amount of town centre retail floorspace. It occupies a position of dominance in the local retail hierarchy, with a town centre food and non-food (study area derived) turnover of £47.8m. The range of retail uses within Lydney is the best in the whole of the Forest of Dean District with a number of national multiples present in the town centre, which is complemented by a good independent retail market.

5.34 There are low levels of leakage of convenience shopping trips from Lydney compared to other towns and current facilities in the town are able to retain 78% of main food shopping trips. In particular, it is important to note that the majority of main food shopping trips, plus a significant amount of top-up food shopping trips, are directed to one store: the Tesco on High Street. The statistical analysis indicates that this store is trading well and visits to the store during the course of this study indicate that it is very popular shopping destination.

5.35 As a result of the above factors, we consider that Lydney has a reasonably good range of convenience shopping facilities, demonstrated by the ability of the town to retain the vast majority of locally-generated shopping trips. The analysis indicates that existing stores (Tesco and Somerfield) are overtrading, although the household survey indicates only limited public support for a new supermarket in the town. Therefore, improvements to the existing foodstores may be more welcome as this could ease congestion experience in the store at present and provide qualitative improvements to the retail experience.

5.36 In relation to comparison retailing, the household shopping survey has found that Lydney is the first choice destination for a number of types of comparison shopping for the majority of its own residents (Zone 1). Currently, Lydney is reasonably popular for DIY, domestic and electrical appliances and luxury items. However, it loses out to Gloucester for clothing and furniture shopping trips. The majority of shopping trips lost from Lydney go to centres outside the District, rather than other Forest of Dean centres. The key attractor outside the district is Gloucester and the ability to claw trade back from Gloucester must be based on a realistic view of the ability for Lydney to compete with retail in this destination and this is considered in more detail in the next section of this report.

5.37 Nevertheless, taking into account the influence of Gloucester (which is explored in more detail in the policy options analysis), there remains a qualitative case for improving comparison shopping facilities (in terms of both quality and range) in Lydney. This is supported by existing levels of leakage and the views of local residents in the household survey (who consider Lydney to be their main centre).

Cinderford

5.38 Cinderford is one of the mid-sized towns in the district and existing retail facilities serve the town of Cinderford and the surrounding smaller settlements. The majority of expenditure comes from residents in Zone 3 of the study area and the combined convenience and comparison turnover of the town centre is £28.6m. In terms of convenience provision there is a modestly sized Co-op store and a Lidl, as well as a limited selection of independent retailers in the town centre. Provision is dominated by the Co-op store, which attracts the majority of convenience expenditure attracted to the town (£13m). In particular, 53% of local (Zone 3) main food shopping trips and 94% of top-up shopping trips are retained by the town centre. These levels of retention indicate that convenience shopping provision in Cinderford is reasonably good, although there is a potential opportunity to retain a further amount of main food shopping expenditure in the future in a pattern similar to that in Lydney. In recent years, Tesco has put forward proposals for a new large supermarket on the site of the existing Cinderford Rugby Club, although a planning permission issued by FODDC has been quashed in the High Court. Importantly, the FODDC household survey indicates public support for a new supermarket in Cinderford. Based on a Retail Assessment of a previous Tesco application, it has been estimated that the Tesco would have a significant effect on convenience shopping patterns in the local area and claw back expenditure (particularly non-food expenditure) which is currently being spend outside the District. Further analysis on the implications of the proposed Tesco are discussed in Section 6 of this report.

5.39 Due to the somewhat limited retail offer in Cinderford, a significant number of local residents (Zone 3) travel to other towns for their comparison shopping. For example over 60% of local residents who consider Cinderford their main centre travel to Gloucester city centre for clothing and footwear shopping trips. A further 14% travel to stores in Bristol for the same items. The household survey indicates that users of Cinderford town centre would like to see an improved range of multiple and independent shops, which is a common theme across most centres in the Forest of Dean. The ongoing proposals for a new Tesco store in Cinderford possess an element of comparison goods sales, which would expand the range of products available to visitors to the town centre.

5.40 As a result of the above factors, we consider there is scope for a qualitative improvement in comparison retail floorspace in Cinderford, on the basis that it can help to improve access to shops and services and additional provision may help to retain more shopping trips in the town. However, the level of qualitative improvement which can be realised in Cinderford is likely to be modest, on the basis that there are limited retailer requirements and the influence that Gloucester and Bristol are likely to have on shopping patterns in the local area. Improvements in provision will also need to be considered against the impact on the town centre.

Coleford

5.41 Within our assessment of retail provision in Coleford we have identified that there is a modest amount of convenience and comparison floorspace. In terms of convenience stores in the town, the existing Co-op, Tesco Express and small Somerfield stores and other independent convenience stores are clearly able to cater for the majority of top-up food shopping needs and low levels of leakage mainly occur to nearby Lydney. The town centre stores in Coleford currently retain 76% of top-up shopping, compared to only 43% of main food shopping trips. Lydney currently attracts over 30% of main food shopping trips from Coleford residents, with the majority of local residents (Zone 2) travelling to the Tesco store in Lydney town centre.

5.42 In relation to comparison shopping, Coleford has a limited retail offer. As with many of the towns in the Forest of Dean, the majority of local residents travel to Gloucester city centre for comparison shopping trips. In terms of local comparison shopping trips, at present Coleford is reasonably popular for furniture, DIY and Domestic appliances, however, loses out to Gloucester in terms of clothing and electrical appliance shopping trips. Overall, there should be a clear aim for Coleford to retain a greater amount of locally-generated non-food shopping expenditure.

5.43 When considering qualitative factors, the size and role of Coleford is an important consideration, along with a realistic approach to the level of retail provision which the town can accommodate. In particular, whilst it is important for the town to provide a range of shops and services for the local population, the proximity of Lydney (and Gloucester and Bristol) and the size of Coleford do not justify significant increases in retail provision. In addition, having regard to the survey, local residents would appear comparatively content with the level of retail provision in the town (both convenience and comparison). Almost 50% of local residents do not dislike anything about the town centre. Therefore, in term of qualitative improvements to retail provision in Coleford, it is our view that additional provision should be provided although this should be complementary to the role of the town within the LDF.

Newent

5.44 Within our assessment of retail provision in Newent, we have identified that there is a reasonable amount of convenience floorspace, reflective of it being the smallest town centre in the District. In terms of convenience stores in the town, there is a Budgens and a small Co-op store, as well as a selection of independent convenience retailers, all of which are in the town centre. Convenience retailing in the town is dominated by foodstores outside the District, which attract two thirds of all main food shopping trips from local residents (Zone 8). Overall, Newent is able to retain a reasonable amount (77%) of locally generated top-up shopping trips, but only 30% of all local main food shopping trips. These are low levels of retention for convenience shopping. In terms of the performance of individual facilities, the Budgens store is currently overtrading. This situation suggests that there is a qualitative case for additional convenience retail provision in Newent which can cater for main food shopping trips. This is also supported by public opinion in the survey results

5.45 For comparison shopping, Newent has a limited retail offer, as the town functions primarily as a rural service centre. The town has a comparison turnover of only £5.4m, of which £4.3m is generated locally (Zone 8). Overall, £45m of local comparison expenditure is leaking to centres outside the District. Gloucester is consistently the most popular destination for comparison shopping trips with local residents and on average attracts 45% of these trips away from Newent. Currently Newent does not attract any spending on electrical appliances.

5.46 Clearly, the proximity and ease of access to Gloucester will limit the level of improvements which can be delivered in relation to the comparison retail offer in Newent. It is our opinion that given the stiff competition in the comparison sector presented by Gloucester, qualitative improvements should be pursued although these should be set at realistic levels.

Inter-relationships of the Four Principal Towns

5.47 Given the broadly comparative size of the four town centres in the District, it is also useful to consider their inter-relationship in terms of comparison shopping trips and expenditure flows, to examine whether each town has a self-contained catchment for non-food shopping or whether there are flows of expenditure between the towns for certain types of trips.

5.48 Having regard to the household survey and quantitative analysis contained in appendices at the rear of this report, it would appear that each of the four Forest town centre are relatively self-contained and the majority of leakage which does occur from each area are trips which are flowing to stores and settlements in surrounding administrative areas rather than other Forest towns. A review of each centre is contained below:

- Lydney. 91% of Lydney's turnover is attracted from the local area and non-local expenditure is attracted in relation to electrical, furniture and recreational goods. Lydney also loses small amounts of expenditure in relation to furniture, DIY and domestic appliances to Coleford.
- Cinderford. 67% of Cinderford's turnover is attracted from the immediate local area and the town is also good at attracting expenditure from the surrounding rural areas to the north and east. The majority of expenditure leaking from Cinderford flows to Gloucester and other administrative areas, although small amounts of expenditure in the furniture and DIY categories flow to Coleford and small amounts of electrical expenditure flow to Lydney.
- Coleford. 67% of Coleford's turnover derived from the immediate local area. The remainder of its turnover is attracted from the Lydney and Cinderford areas, as outlined above.
- Newent. 80% of Newent's turnover is derived from the local area, with the remainder attracted from the surrounding rural areas rather than the other towns in the south of the District.

6. BROAD POLICY OPTIONS FOR RETAILING IN THE FOREST OF DEAN

Overview

6.1 This section of the report takes forward the findings of the quantitative and qualitative assessments of need for additional retail floorspace in the Forest of Dean and assesses the broad policy options for retail land use provision in each of the principal towns in the District. Based on considerations of quantitative and qualitative need, plus the sequential approach to site selection, we have recommended the following ranges of future retail development capacity in the main Forest towns (dependant on the ability to secure town centre locations for this level of development):

Table P: Recommended Retail Strategies for Forest of Dean Settlements, 2007-2021

Settlement	Recommended Strategy	
	Convenience Retail	**Comparison Retail**
Lydney	Constant Market Share (up to 624sq m net by 2021)	Revised Market Share (up to 2,444sq m net by 2021)
Cinderford	Revised Market Share (based on local expenditure = up to 1,259sq m net by 2021, although this could be increased if expenditure from other areas can be utilised)	Revised Market Share (up to 2,286sq m net by 2021)
Coleford	Revised Market Share (up to 1,220sq m net by 2021)	Revised Market Share (up to 1,336sq m net by 2021)
Newent	Revised Market Share (up to 1,361sq m net by 2021)	Revised Market Share (up to 1,226sq m net by 2021)

(N.B. it should be noted that the above floorspace capacity figures outlined above can only be indicative, as the sales densities used may vary from the specific trading characteristics of individual proposals which may be submitted to FODDC. Therefore, we urge the local planning authority to also have regard to the surplus retail expenditure figures contained within the statistical analysis of capacity contained within appendices to this report)

Introduction

6.2 In order that Forest of Dean District Council can progress the production of its suite of Development Plan Documents, it is important that this study uses the survey findings, as contained in preceding chapters of this report, to develop broad policy options for retailing in the Forest of Dean area. This will allow the Council to develop a front-loaded LDF and will encourage a meaningful response from the local community and key stakeholders on a genuine choice of options for retail uses. Accordingly, this section considers the outputs from the town centre health, quantitative and qualitative analyses, to help define the potential options for retail development and the contents of the Core Strategy. In turn, it will assist the Council in: agreeing an area-specific vision, defining key objectives for the LDF and defining a spatial strategy which is consistent with other policy documents.

6.3 At this point, it is worth reiterating the main features of national, regional and strategic policy which will guide the contents of FODDC's LDF strategy. At the national level, the key objective is to plan for the growth and development of existing centres, plus promoting and enhancing existing centres, by focusing development in these locations. At the regional and strategic level, many of these objectives are reproduced, although RPG10/draft RSS and the Structure Plan add the following objectives:

- Locate retail uses which attract large numbers of people in the centres of the Principal Urban Areas and other centres specified for growth.
- Encourage town centre developments of an appropriate scale in the market towns and larger settlements in keeping with their size, function and role in the settlement hierarchy.
- Ensure the vitality and viability of existing centres is maintained, including a distribution of convenience provision which minimises the length and frequency of trips.

6.4 In light of the foregoing, the remainder of this section is split into two distinct sections to recognise the different Development Plan Documents which will form part of FODDC's LDF. The first analyses the potential suitability of development sites within a number of the principal settlements for retail development. The second, deals with different potential approaches to additional retail development in the Forest of Dean over the lifetime of the LDF, taking into account the preceding need and site assessment analyses. Each is discussed in turn below.

Review of Potential Shopping / Leisure Development Opportunities

6.5 In terms of the locational aspects of retail provision, PPS6 advises that a sequential approach should be applied in selecting sites for allocation within the centres where identified need is to be met. All options in the centre (including, where necessary, the extension of the centre) should be thoroughly assessed before less central sites are considered for development. Having regard to the sequential approach to site selection, PPS6 asks that locations for new development are considered in the following order:

- first, locations in existing centres, which will become available in the development plan document period and are of an appropriate scale in relation to the role and function of the centre;

- second, edge-of-centre locations, with preference given to sites that are well connected to the centre; and then
- third, out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

6.6 Therefore, when considering the locational aspects of new retail provision in the Forest of Dean, this study has taken into account latest Government guidance when identifying a range of sites and locations to assess. Following discussions with FODDC, it has been agreed that the focus of the locational assessment should be on a number of locations within the four principal town centres in the District, in order that every effort is made by FODDC to support the aims and objectives of national policy. As a result, the sites set out below have been identified for the locational assessment. It should be noted however that this list is not necessarily a reflection of the full range of possible suitable sites within the four towns since GVA Grimley may be unaware of other potential opportunities. In particular, other sites may emerge through preparation of the LDF.

1. 12 High Street, Lydney
2. Newerne Street Car Sales Forecourt/Rear of Newerne Street/Hams Road, Lydney
3. Thompson & Thompson Garage Site, Lydney
4. Travis Perkins Site, Hill Street, Lydney
5. Land at Steam Mills Road, Cinderford
6. 1960's Block, 10-20 High Street, Cinderford
7. Merretts, 13 High Street, Cinderford
8. Health Centre Site, Cinderford
9. Rear of 1-11 High Street, Cinderford
10. Telephone Exchange, Cinderford
11. Rear of Westgate Stores, front of Miners Welfare Hall, Cinderford
12. Library Car Park, Newent
13. Rear of Broad Street, Newent
14. The Shambles and rear parking area, Newent
15. Coach & Car Park, Old Station Way, Coleford
16. Lawnstone House & The Bungalow, High Street, Coleford
17. Frontage of Library Site, Bank Street, Coleford
18. The Marshes, Lords Hill, Coleford
19. Cinderford Rugby Club, Dockham Road, Cinderford

6.7 Embedded within the rationale for choosing each of these options is PPS6 guidance. Paragraph 2.16 advises local planning authorities, when preparing plans at the local level, to:

- Identify deficiencies in existing provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre.
- Identify the centres where development will be focused.
- Identify and allocate sites in accordance with the sequential approach to site selection (see below).
- Review all existing allocations and reallocate sites which do not comply with this policy statement.

6.8 PPS6 advises that an appropriate range of sites should be identified to accommodate the identified need which are capable of accommodating a range of business models. Sites should be identified that are, or are likely to become, available for development during the development plan document period and which will allow for the accommodation of the identified need. PPS6 also asks for flexibility from local authorities when identifying sites, including being sensitive to the needs of developers, in terms of scale, format, car parking provision and disaggregation.

6.9 This locational analysis also takes into account the prospect of site assembly and responds to the guidance set out in paragraph 2.52 of PPS6. The guidance notes that local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly. An apparent lack of sites of the right size and in the right location should not be construed as an obstacle to site allocation and development to meet this need. Local planning authorities should consider the scope for effective site assembly using their compulsory purchase powers, to ensure that suitable sites within or on the edge of centres are brought forward for development, including sites that are under utilised, such as car parks and single-storey buildings, which could be redeveloped for multi-storey, mixed-use development.

6.10 In order that the comparative overall suitability of each option can be assessed, our locational assessment has tested each location against a range of criteria which are applicable to both the 'principle' of each site being identified for retail uses and a number of detailed criteria which will guide how each site is (re)developed. These criteria include access, neighbouring uses, ability to meet identified need, commercial attractiveness, development costs, visual impact and ease of displacing existing uses. Furthermore, when concluding on the acceptability of each location for retail uses, we have tested each location against PPS6 guidance on the application of the sequential approach to site selection. Whilst this guidance appears in the 'development control' section of PPS6, it is nevertheless useful for the consideration of individual locations. In the development control section, PPS6 advocates the consideration of three key tests for the assessment of sites:

- Suitable for the proposed development;
- Viable for the proposed use; and
- Available within a reasonable period of time.

6.11 In terms of suitability, the alternative sites considered in this assessment must be of a size which can accommodate part or all of the types of uses identified in the need assessment earlier in this report. When assessing suitability, account has been taken of the requirements of national planning policy guidance which requires both developers, retailers and local planning authorities to be flexible about the format, design and scale of the development proposed, the amount of car parking, and the ability to disaggregate individual parts of the proposed retail floorspace. Nevertheless, it should be understood that flexibility on the design and format of a scheme can only be considered within the confines of the identified need. In selecting sites for retail development, PPS6 also advises that account should be taken of factors relating to physical regeneration, employment, economic growth and social inclusion and weight given to locations that best serve the needs of deprived areas.

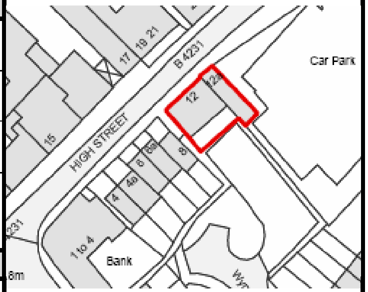
6.12 In terms of viability of alternative sites to accommodate retail uses, it is an essential prerequisite that any potential developer/retailer must be satisfied (in principle) that they can, *inter alia*, provide (and operate) retail uses which can successfully operate from the site in relation to the number of car parking spaces, the suitability of the servicing access in relation to surrounding land uses and accommodating a suitable store layout in the actual retail unit. Importantly, in this respect, the costs of acquisitions should be such that the development would be economically viable. Other constraints are also likely to weigh in the consideration of viability, for example design requirements (construction materials, finished appearance, external form and appearance).

6.13 In relation to the assessment of availability, the land required for the development should be available within a reasonable period of time. The assessment of availability should also consider the details of site ownership and any problems that may arise from land assembly.

6.14 The assessment of each option against each of the above criteria is contained on the proforma sheets overleaf.

SITE 1: 12 HIGH STREET, LYDNEY

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Lydney town centre
Site area / size	0.02Ha
Existing land-uses	Vacant residential/retail premises
Adjoining land-uses	Mixture of retail, commercial and residential uses within Lydney town centre. The Tesco staff car park is located immediately to the north east of the property.
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific allocation, but within town centre boundary and Lydney Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	Given it location on High Street, the site benefits from reasonably good accessibility by car.
Accessibility by public transport	Reasonable access by public transport, although the site is located at the opposite end of the town centre from the bus station.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Existing accesses will be utilised within redevelopment scheme, and the site benefits from a rear service yard with a separate access from Wyntour's Parade.
Parking	The existing yard to the rear of the property could provide some on-site car parking.
Impacts on neighbouring properties / land	The property is currently vacant and in a state of disrepair, therefore any redevelopment of the site is likely to have a positive impact on neighbours. However, consideration should be given to over looking the surrounding residential properties.
Visual Impact	The location of the site on High Street means that any redevelopment will improve the visual impact of the building on the streetscape.
Servicing	Site is reasonably constrained and careful servicing design will be required, but potential for the yard to the rear to be used for service exists .
Difficulties with displacing existing uses	The property is currently vacant, therefore no existing uses to be displaced.
Environmental impacts	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site has the potential to be suitable for retail, office or residential uses, although retail is only likely to be provided as part of a redevelopment scheme.
Development Costs	No onerous development costs envisaged.
Timescale	Short to medium term opportunity
Commercial Attractiveness	Commercial viability of current building on site for retail uses is questionable given location. Residential and/or office uses may present the best option for the existing structure, although redevelopment may offer the potential for some retail uses.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This location has limited potential for providing additional retail floorspace
Trade Draw	Neutral or (assuming redevelopment) minor positive impact on the town centre.



CONCLUSIONS

Overall Conclusions:
This site lies on the outskirts of the town centre and is somewhat detached from the retail core of Lydney. The property is vacant and therefore has an opportunity to introduce new uses into the town centre in the short term. The size and location of the property limit is potential for retail development and office or residential uses may be provided on the upper floors. Another, more radical opportunity to improve the attractiveness of this site for retail and commercial uses, would be to include part of the Tesco staff car park within the development site in order to create a larger retail/commercial unit and provide more commercial frontage along High Street (as Tesco car park provides 'dead' frontage which does little to enhance the streetscene).

SITE 2: NEWERNE STREET CAR SALES FORECOURT/REAR OF NEWERNE STREET

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Lydney town centre.
Site area / size	0.83Ha
Existing land-uses	Car sales garage, surface level car park, retail units (including vacant Post Office) tyres and car repairs garage.
Adjoining land-uses	The site fronts on to Newerne Street, part of the retail core. To the rear of the site is Somerfield foodstore and the bus station.
B. PLANNING POLICY ISSUES	
Planning Policy Status	There is no site specific policy allocation, although site is located within the town centre boundary and the northern part of the site is included within the primary retail frontage. During the course of the Retail Study the Council received a mixed-use proposal for the Hylton Court site on the corner of Newerne Street and Ham Road. The scheme is retail on the ground floor and 12 residential flats on the upper two floors.
C. ACCESSIBILITY	
Accessibility by private car	Access by car is good, however, this part of the town centre can experience high level of traffic congestion. The site benefits from a number of different access points.
Accessibility by public transport	The site is immediately adjacent to the bus station to access by public transport is particularly good.
D. CONSTRAINTS TO DEVELOPMENT	
Access	No onerous constraints envisaged, along main access is likely to be from Ham Road.
Parking	This is a sizeable and level site so capacity for on site parking as part of any redevelopment is good. There is also on-street parking and the Somerfield customer car park to the rear of the site.
Impacts on neighbouring properties / land	Need to ensure that there is no detrimental impact on operation of the bus station and traffic flows along Newerne Street
Visual Impact	This site lies at the eastern gateway to Lydney town centre and is in a highly visible location. High quality design required in order to enhance this prominent location.
Servicing	No onerous constraints envisaged.
Difficulties with displacing existing uses	Redevelopment will depend on the ability to find alternative locations for existing uses, although some existing uses could be re-accommodated as part of a redevelopment scheme.
Environmental impacts	Close to watercourse running through the town centre, so consideration should be given to surface water drainage and flooding issues.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	This is a prime retail location and has potential to add to the retail offer in the town centre significantly. Whilst the current scheme for the Hylton Court site proposes a mix of uses consistent with guidance in PPS6 and would provide an active frontage along Newerne Street, the scale of the proposed building would appear out of keeping with the local area. It would also result in a piecemeal approach to redevelopment, which is not as favourable as comprehensive redevelopment approach to the wider area.
Development Costs	Development costs will be dependant on the need to find new locations for existing uses on this site.
Timescale	Medium term and dependant on relocation/reorganisation of existing uses.
Commercial Attractiveness	Likely to be highly attractive to a range of retail uses, along with other commercial land uses.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	Leaving aside the ability to re-organise/relocate existing on-site uses, this site has the potential to accommodate significant amounts of retail development.
Trade Draw	Site is in a prime town centre location, and has the ability to provide a positive impact on the vitality and viability of the town centre.

CONCLUSIONS

Overall Conclusions:
This is a key redevelopment site within the heart of Lydney town centre. It is very close to excellent private and public transport links and close to the primary retail frontage in the centre. The northern part of this site presents an excellent opportunity to improve the retail and commercial frontages on the southern side of Newerne Street, which at present suffers from large gaps caused by the open air car sales forecourt. There is also an important opportunity to improve the frontage to the watercourse which runs along the western boundary of this site. Redevelopment can also greatly improve pedestrian linkages between the Somerfield store and bus station areas with the core retail area, as at present the layout offers a barrier to movement. We propose that the Council should consider promoting a comprehensive redevelopment of the whole of this area to be provide the aforementioned benefits. Retail units will form a key part of the scheme and should be placed along Newerne Street. The level of new accommodation of this site will obviously be based on the ability to reorganise car parking provision on this site.

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International Property Advisers

SITE 3: THOMPSON & THOMPSON GARAGE SITE, LYDNEY

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Outside Lydney town centre.
Site area / size	1.12Ha
Existing land-uses	Petrol Filling Station and Car sales and repairs – some parts of this site are vacant
Adjoining land-uses	Agricultural fields
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. The site is located outside the defined settlement boundary of Lydney.
C. ACCESSIBILITY	
Accessibility by private car	Good via local highway network – good links to Lydney bypass.
Accessibility by public transport	Close to one bus service, along Highfield Hill
D. CONSTRAINTS TO DEVELOPMENT	
Access	No onerous constraints envisaged.
Parking	Site is reasonably large and can accommodate reasonable levels of on site parking.
Impacts on neighbouring properties / land	No adjoining properties or uses.
Visual Impact	Opportunity to improve visual appearance of the buildings, which is currently poor. This is a visually prominent location on the outskirts of Lydney.
Servicing	No onerous constraints envisaged.
Difficulties with displacing existing uses	Existing PFS and car sales garage will need to be relocated
Environmental impacts	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Site is too far away from the town centre for retail uses to be acceptable. It is against national planning policy to encourage retail/town centre uses in such a location. Alternative commercial uses may be acceptable, subject to development boundary policies.
Development Costs	No onerous costs envisaged.
Timescale	Medium term opportunity.
Commercial Attractiveness	This site may be attractive to a range of uses, depending on its availability
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	As an out-of-centre site this location should not come forward for meeting any retail need in Lydney.
Trade Draw	Site is located outside of the town centre and retail uses would act as a stand alone location and have a potential negative impact on the town centre.

CONCLUSIONS

Overall Conclusions:

This site is separate from Lydney town centre and is not linked to any other retail or commercial uses. It is in an out-of-centre location and also located outside of the defined development boundary. The key to redevelopment of this site will be the relocation of the existing petrol filling station and car sales use. We do not consider this location offers the potential for retail uses, given the sequential approach to site selection.

GVA Grimley
International Property Advisers

SITE 4: TRAVIS PERKINS SITE, HILL STREET, LYDNEY

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Lydney town centre
Site area / size	1.38Ha
Existing land-uses	Travis Perkins builders yard, area of vacant land within central part of site, plus retail and commercial properties fronting on to Hill Street.
Adjoining land-uses	Railway line to west, retail and commercial properties to the south (on the opposite side of Hill Street), watercourse to the east and north
B. PLANNING POLICY ISSUES	
Planning Policy Status	Located within defined town centre boundary and central part of site (to the south of the TP use) is allocated within adopted Local Plan for residential development (10 dwellings).
C. ACCESSIBILITY	
Accessibility by private car	Close to main vehicular route through Lydney town centre, although access onto Hill Street is poor.
Accessibility by public transport	Close to public transport services within Lydney town centre.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Vehicular access into main part of site is currently poor and revisions will be required as part of any redevelopment scheme.
Parking	Site is large enough to accommodate on-site parking provision for any new uses introduced into this site.
Impacts on neighbouring properties / land	Consideration will need to be given to impact on adjacent watercourse and how redevelopment will affect properties fronting on to Hill Street.
Visual Impact	Whilst the majority of this site is hidden from the main route through Lydney town centre, central part of site is unattractive and redevelopment offers the opportunity to improve this area of the town centre.
Servicing	See comments in relation to access. Also, rear servicing of properties fronting on to Hill Street will need to be considered.
Difficulties with displacing existing uses	Central part of site is available for redevelopment in the short term and there may be constraints to schemes which include properties fronting on to Hill Street.
Environmental impacts	Consideration will need to be given to effect of redevelopment on adjacent watercourse.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Acquisition Costs	Costs will be dramatically increased if the numerous ownerships fronting on to Hill Street are required.
Development Costs	No abnormal costs envisaged, apart from potential for flood risk alleviation measures.
Timescale	Will be dependant on area of land to be included within scheme and central part of the site is likely to be the only short term development area.
Commercial Attractiveness	Assuming that existing properties along Hill Street remain, this is unlikely to offer an attractive retail development opportunity and residential allocation is likely to be preferred, along with specialist commercial uses which do not require primary retail frontage presence.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site offers the opportunity to meet some of the identified comparison goods capacity in Lydney.
Trade Draw	Additional retail uses on this site have the potential to have a positive impact on the attractiveness of Lydney town centre.

CONCLUSIONS

Overall Conclusions:
This site offers one of the larger redevelopment opportunities within Lydney town centre and there is an opportunity to make much more efficient use of this area. The existing Local Plan allocation for residential development is an appropriate proposal for this site and offers the opportunity to improve the appearance of this area. This site lies close to the commercial core area in Lydney town centre and consideration should be given to the opportunity that redevelopment of this site presents to provide retail and other commercial uses. However, attractiveness of the whole site for retail development will be reduced unless the existing properties fronting Hill Street can be removed in order to give better site visibility.

SITE 5: STEAM MILLS ROAD, CINDERFORD

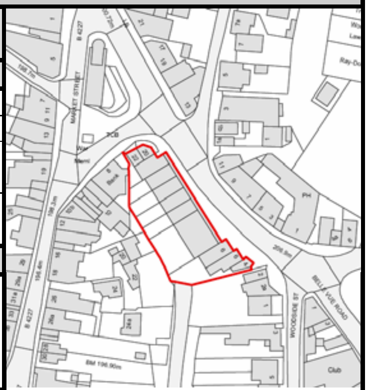
ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Located within the north part of the urban area of Cinderford; outside of the town centre boundary
Site area / size	-
Existing land-uses	Petrol filling station, garage and vacant greenhouses
Adjoining land-uses	Residential and commercial uses
B. PLANNING POLICY ISSUES	
Planning Policy Status	Site lies within an area proposed for the intensification of employment uses under Policy (R)F.Cinderford 1 in the adopted Local Plan. Land to the south of this site is allocated for residential development. Site is within defined settlement boundary of Cinderford.
C. ACCESSIBILITY	
Accessibility by private car	Site lies on main northerly route out of Cinderford and provides good access on to Steam Mills Road.
Accessibility by public transport	At present, poor accessibility by public transport.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Unlikely to be a major constraint, although proximity of existing junction between Valley Road and Steam Mills Road will be a consideration.
Parking	Site is large enough to accommodate on-site parking provision.
Impacts on neighbouring properties / land	No onerous constraints envisaged.
Visual Impact	Site is currently in poor state of repair and there is an opportunity to improve the visual appearance of this location via redevelopment.
Servicing	Unlikely to be a constraint to redevelopment.
Difficulties with displacing existing uses	Site is vacant, so no constraints envisaged.
Environmental impacts	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Site is in out-of-centre and therefore is not a first choice location for retail uses. However, site may be suitable for a bulky goods use, if town centre or edge of centre sites in the local area are not available or suitable. This is confirmed by the grant of planning permission for a 3,200sq m gross DIY store and garden centre. FoDDC are currently investigating the potential for a long stay car park in this location.
Development Costs	Unlikely to be abnormal.
Timescale	Short to medium term opportunity.
Commercial Attractiveness	Likely to be attractive to large format retail and other commercial operators who are unable to find appropriate premises in town centre locations.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site has the potential to meet a need for large format bulky goods use which cannot be accommodated within a town centre location (subject to the sequential approach to site selection).
Trade Draw	Given out-of-centre location, some retail uses in this location could have an impact on town centre health, although actual impact will depend on type of retail use provided.

CONCLUSIONS

Overall Conclusions:
This is an out-of-centre site and is not a preferred location for all types of retail development (given the potential suitability of sites within and on the edge of Cinderford town centre). However, should town centre and/or edge-of-centre sites not be available, this site may have the potential to accommodate a bulky goods use which cannot be accommodated in more central locations. This is confirmed by the recent grant of planning permission for a DIY store. Redevelopment of this site also offers the opportunity to improve the visual appearance of this site which is poor at present. The development for alternative uses such as a long stay car park in this location would help alleviate some of the parking problems currently experienced in the town centre.

SITE 6: 1960'S BLOCK 10-20 HIGH STREET, CINDERFORD

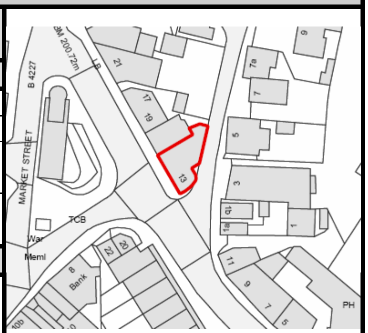
ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Cinderford Town Centre
Site area / size	0.15Ha
Existing land-uses	Retail uses on the ground floor and residential on the upper floors
Adjoining land-uses	Retail and other town centre uses
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. The site is within Cinderford town centre boundary and has the benefit of primary retail frontage for the full length of the site.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good, given the town centre location, although central town centre location can be problematic at peak times due to traffic congestion.
Accessibility by public transport	Very good – close to bus services.
D. CONSTRAINTS TO DEVELOPMENT	
Access	No access into the site from High Street, although access also exists via Woodside Street
Parking	The site is relatively small and constrained therefore any car parking associated would be for occupiers only (to the rear).
Impacts on neighbouring properties / land	Site is close to a number of other commercial uses and has residential properties on the upper floors some of which are in separate freehold ownership, therefore acquisition of the whole block for comprehensive redevelopment would be difficult and cost. Therefore a short term block improvement scheme with qualitative improvements to the urban fabric is the likely best option. Remodelling of the block could affect servicing and access to the retail and residential uses in the short term.
Visual Impact	Prominent site within town centre. Current appearance is dated and the immediate area would benefit from cosmetic improvements to the block.
Servicing	Key consideration will be the effect of redevelopment on servicing on other properties and the constraint access. There is potential for servicing from Woodside Street.
Difficulties with displacing existing uses	There are numerous separate uses on this site, which are within separate ownerships and which may cause a significant constraint to comprehensive redevelopment.
Environmental impacts	No onerous environmental impacts envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site already offers retail uses on the ground floor although the opportunity exists to expand ground floor accommodation to the rear (assuming that it is not required for servicing).
Development Costs	Costs will be dependant on the ability to purchase interests in this site.
Timescale	Short opportunity for cosmetic improvements, although comprehensive redevelopment may be a longer term scheme.
Commercial Attractiveness	This site is clearly commercially attractive, as evidenced by the full occupation of the ground floor.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site is unlikely to accommodate a large part of the identified need for Cinderford, although increases in retail floorspace have the potential to accommodate some of the surplus capacity.
Trade Draw	The site is within the primary retail frontage of the town centre, therefore any improvements to the appearance of these units will benefit the town centre.



CONCLUSIONS

Overall Conclusions:
This is central town centre site with numerous ground floor and first floor residential occupiers, which provides an important range of uses for Cinderford town centre. At present, the appearance of the site is dated and through work already undertaken by the District Council an opportunity for improvements to this site has been recognised. For example, there is an opportunity to consider expansion of the space devoted to ground floor retail to provide larger retail units and potentially better linkages to other parts of the town centre. However, the current ownerships (separate residential freeholds on upperfloors) will restrict the options for comprehensive redevelopment and therefore remodelling and cosmetic improvements to the appearance of the block are likely to be the best short-term option for the site.

SITE 7: MERRETTS, 13 HIGH STREET, CINDERFORD

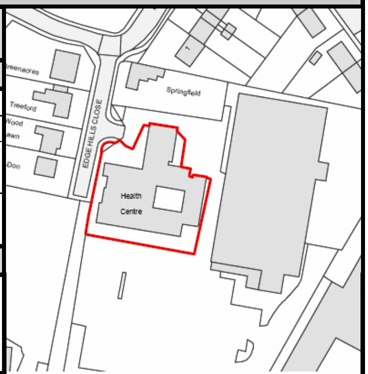


ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Cinderford town centre
Site area / size	0.02Ha
Existing land-uses	Merretts retail store on the ground floor and residential accommodation on upper floor.
Adjoining land-uses	Retail and other town centre uses.
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. The site is within Cinderford town centre boundary and has the benefit of primary retail frontage along the High Street frontage of the site.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good, given the town centre location, although central town centre location can be problematic at peak times due to traffic congestion.
Accessibility by public transport	Very good – close to bus services
D. CONSTRAINTS TO DEVELOPMENT	
Access	No access is available into the site and busy nature of High Street and Heywood Road indicates potential vehicle conflicts. Gloucestershire County Council do not have any aspirations to widen Heywood Road as the intension is to reduce vehicle speeds in the town centre to 20mph.
Parking	No space for on-site parking, although the Heywood Road car park is close by.
Impacts on neighbouring properties / land	Site is close to a number of other commercial uses and therefore careful site layout will be required for any redevelopment scheme. Biggest impact will be on the operation of and movement along Heywood Road. The Council are currently considering the redevelopment of the site which would include the widening of the pavement to two-metres on High Street which would improve pedestrian access to Heywood Road.
Visual Impact	Prominent site within town centre. Redevelopment will need to provide high quality design which respects the amenities of neighbouring properties.
Servicing	Servicing of this unit will be constrained by its town centre location and the traffic congestion.
Difficulties with displacing existing uses	This site already accommodates an existing use, which will need to be relocated/reprovided as part of any redevelopment scheme.
Environmental impacts	No onerous constraints envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Given its location within the primary retail frontage, a retail land use is the preferred option for this site.
Development Costs	Redevelopment of the site itself is unlikely to lead to abnormal costs, although works to widen/remodel the adjacent Heywood Road could increase costs.
Timescale	Depending on intentions of existing use, short to medium term opportunity.
Commercial Attractiveness	Redevelopment of this site could provide attractive retail premises within the heart of Cinderford town centre.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	Given the size of this site and the existence of retail uses already on site, redevelopment is unlikely to offer the potential for increases in retail floorspace in this location.
Trade Draw	Redevelopment is likely to have a minor positive impact on the trade draw to the town centre, primarily where access and movement along Heywood Road can be resolved.

CONCLUSIONS

Overall Conclusions:
This is a small but prominent site within the heart of Cinderford town centre. It currently accommodates an existing retail uses and the rationale for redevelopment lies not in the ability to expand retail/commercial uses but in the ability to improve pedestrian access and movement along High Street and Heywood Road. Heywood Road car park is the largest Council-owned car park facility in the town centre, but pedestrian access to and from this facility along Heywood Road and Hgh Street is constrained by the width of the pavement adjacent to this site. Therefore, redevelopment of this site is vital in order to improve pedestrian access and movement, and as a result the overall attractiveness of the town centre for shoppers. Widening the pavement in this location would achieve this, but with the result being the potential loss of some current retail floorspace on the site.

SITE 8: HEALTH CENTRE SITE, CINDERFORD



ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Cinderford town centre
Site area / size	0.15Ha
Existing land-uses	Cinderford Health Centre
Adjoining land-uses	Co-op foodstore and associated car parking and residential properties
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located within Cinderford town centre boundary, but not within the primary retail frontage.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good, although congestion occurs within adjacent Co-op car park.
Accessibility by public transport	Excellent – short distance from bus services.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Current access is via Edge Hills Close and Co-op car park..
Parking	There is scope for limited on site parking. Also potential for arrangements to be made with Co-op, however this is already a busy shoppers car park.
Impacts on neighbouring properties / land	Redevelopment will need to consider the impact of traffic visiting the adjoining Co-op and the neighbouring residential properties
Visual Impact	There is an opportunity to improve the visual appearance of this site. The Health Centre is a somewhat dated building in its appearance.
Servicing	Given the poor quality of the surrounding road network, servicing a retail unit in this location may be problematic.
Difficulties with displacing existing uses	This is potentially a key site for Cinderford town centre; it is understood that the Gloucester Primary Care Trust are currently reviewing their requirements. Therefore this site could become available in the short-medium term for retail redevelopment
Environmental impacts	No onerous constraints envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The current health centre use is important to the town centre, although if it were to be relocated elsewhere then this site would be suitable for retail, office, commercial and residential uses.
Development Costs	No onerous constraints envisaged, apart from the need to potentially find alternative premises for the Health Centre facility.
Timescale	Medium term opportunity – Dependent on the relocation of the Health Centre
Commercial Attractiveness	It is uncertain whether this location would be attractive to retail operators, particularly given the access/servicing constraints.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	Assuming that existing uses can and should be displaced, then there is an opportunity to provide moderate levels of retail floorspace in this location.
Trade Draw	This site has the potential to provide a positive benefit to the town centre, although access and linkage issues will need to be addressed in order to ensure that the impact on the town centre remains positive.

CONCLUSIONS

Overall Conclusions:

This is potentially a key site for improvements to Cinderford town centre. The health centre provides an important resource for Cinderford town centre and is situated within a central location. However, Gloucestershire PCT are currently reviewing their property requirements for Cinderford. Should this site become available, we consider it would be acceptable for a range of uses included retail uses which could be served by the adjacent Co-op car park. Redevelopment may include the adjacent Co-op store, should the Co-op wish to remodel its own store in the future. Should retail uses be intensified in this location, then we consider that pedestrian linkages with the core retail area should be improved along Dockham Road.

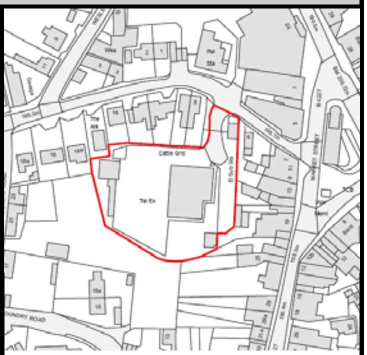
SITE 9: REAR OF 1-11 HIGH STREET, CINDERFORD

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Cinderford town centre
Site area / size	0.26Ha
Existing land-uses	Co-op foodstore overflow car park and properties on Heywood Road.
Adjoining land-uses	Co-op foodstore main car park, residential and retail.
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located within Cinderford town centre boundary. Adjacent to an allocation within the adopted Local Plan for primarily retail uses, but also with a small amount of residential use.
C. ACCESSIBILITY	
Accessibility by private car	Reasonable access via High Street and Heywood Road – separate from the Co-op main car park.
Accessibility by public transport	Excellent – very close to bus services
D. CONSTRAINTS TO DEVELOPMENT	
Access	Congested town centre environment will constrain access from Heywood Road, although better access is available via the Co-op car park.
Parking	This car park is well used and can experience congestion at peak times of the day. Loss of parking to an alternative use will need to be considered carefully and parking provision may need to be provided elsewhere in the centre.
Impacts on neighbouring properties / land	Operation of adjacent Co-op will need to be considered, as the overflow car park is used on a daily basis. Impact on residential neighbours should also be considered, particularly in terms of the height of any development.
Visual Impact	Relatively concealed site, therefore visual impact will be limited.
Servicing	Servicing access is constrained via both Heywood Road and the Co-op car park.
Difficulties with displacing existing uses	This car park is well used and can experience congestion at peak times of the day. Loss of parking to an alternative use will need to be considered carefully and parking provision may need to be provided elsewhere in the centre.
Environmental impacts	No onerous impacts envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Potential for retail development will depend partly on whether the existing car park use can be released. Potential for on site parking and retail uses in a multi-level development.
Development Costs	No onerous costs envisaged.
Timescale	Medium – long term
Commercial Attractiveness	Likely to be attractive to retail operators, along with a number of other land uses.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This is a reasonably large site and has the ability to accommodate reasonable levels of retail floorspace. Its ultimate suitability will depend upon the availability of the site and loss of car parking provision.
Trade Draw	Linkages with the town centre core retail area are very good and retail development of this site would have a positive impact on the town centre,

CONCLUSIONS

Overall Conclusions:
This is a sizeable area of land within Cinderford town centre, currently used as a surface level car park by shoppers visiting the adjacent Co-op store and the town centre generally. The car park is well used and can reach full capacity at peak times. Work on the Cinderford Business Plan indicates that this site may have the potential to provide a new link from High Street/Heywood Road to the Co-op store, including a new parade of retail units. Additional retail provision in this location should be welcomed, as would a new link to the Co-op, although the ability to undertake redevelopment will depend on the ability to reduce car parking provision in this location. At present, this parking facility is well used and loss of car parking capacity, without reprovision elsewhere, may not be acceptable. Nevertheless, we support the principle of retail development in this location.

SITE 10: TELEPHONE EXCHANGE SITE, CINDERFORD



ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Cinderford town centre
Site area / size	0.33Ha
Existing land-uses	Telephone exchange, residential uses, electricity sub station.
Adjoining land-uses	Commercial and residential uses within a tight urban street pattern.
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located with Cinderford town centre boundary.
C. ACCESSIBILITY	
Accessibility by private car	Moderate accessibility via the narrow Station Road and constrained access on to Market Street.
Accessibility by public transport	Site is reasonably close to public transport services in Cinderford town centre, although Station Road presents a relatively steep climb to High Street and the bus stops.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Existing access points are not suitable for large scale retail uses which generate large volumes of traffic. The Council are considering the closure of the Triangle to through traffic as part of the wider public realm improvements to fully pedestrianse the Triangle. This would further restrict the vehicular access to the site.
Parking	The site has potential to provide a reasonable amount on-site car parking
Impacts on neighbouring properties / land	Site is surrounded by residential and other commercial uses. Redevelopment for a land use attracting large numbers of visitors may raise concerns over residential amenity.
Visual Impact	Site is not very visible at present, but given close proximity of neighbouring properties careful design required, in order to promote visibility.
Servicing	Given existing access arrangements, servicing is likely to be problematic.
Difficulties with displacing existing uses	The site in currently in use and relocation of the Telephone Exchange is likely to be problematic.
Environmental impacts	No onerous constraints envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Given its proximity to the town centre, retail uses in this location are a potential use, although it is separated from the main retail area and a residential use led mixed use scheme may be more acceptable and commercially attractive.
Development Costs	Costs may be increased in order to relocate the Telephone Exchange from the site.
Timescale	Medium to long term opportunity
Commercial Attractiveness	On its own, this site is unlikely to be attractive to a scheme involving retail uses, given lack of primary retail frontage. Further site assembly including properties on Market Street, or an alternative redevelopment route (involving a residential led scheme) is suggested.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	Site may be able to accommodate some retail uses, although the extent of retail uses will depend on the amount of land assembled for redevelopment.
Trade Draw	Depending on the range of uses provided, redevelopment of this site is likely to have a minor positive impact on the health and attractiveness of the town centre.

CONCLUSIONS

Overall Conclusions:

This is a relatively large site located on the western edge of the core retail area in Cinderford town centre. The site is accessed from Station Road, which is a narrow highway leading from Market Street, which will constrain access to the site and the range of uses which it can accommodate. The Council are currently considering the closure of the Triangle to through traffic as part of public realm improvements which would restrict the accessibility of this site further. The site sits behind properties on Market Street and feels somewhat separated from the main retail area and, as a result, is unlikely to be attractive (in its current form) for large scale retail uses. As an alternative approach, a mixed use redevelopment scheme may be more acceptable, based on residential and other commercial uses. However, the key to redevelopment will be the ability to relocate/remove the existing telephone exchange. Such exercises can, in our experience, be costly and it is unclear whether in this instance the operator of the exchange would consider relocation. Nevertheless, in principle, this site offers an important redevelopment opportunity which can add to the overall vitality of the town centre, although not through a retail led scheme.

SITE 11: REAR OF WESTGATE STORES, FRONT OF MINERS WELFARE HALL, CINDERFORD

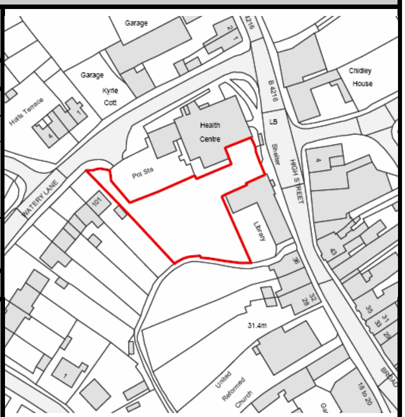
ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Cinderford town centre
Site area / size	0.45Ha
Existing land-uses	Police Station, residential properties, public parking and service yard for Westgate Department Store and retail premises.
Adjoining land-uses	Residential, retail and other town centre uses.
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located within Cinderford town centre boundary and immediately adjacent to the primary retail frontage.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good accessibility via High Street, although traffic congestion can be problematic.
Accessibility by public transport	Reasonably close to bus services within the town centre
D. CONSTRAINTS TO DEVELOPMENT	
Access	Access from Wesley Road/Station Road is constrained by the tight urban street pattern.
Parking	Site is large enough to accommodate some on-site parking provision. In line with the aspirations set out in the Cinderford Business Plan; redevelopment providing additional parking in conjunction with other retail/commercial uses would be suitable for this site.
Impacts on neighbouring properties / land	Whilst site is close to a number of residential properties, we do not consider that redevelopment of this site will cause significant amenity problems. There is an existing service yard on the site, clearly visible from the neighbouring residential properties.
Visual Impact	Prominent site on the northern approach to Cinderford town centre, which currently is in poor state of repair. There is an opportunity here to provide an improved gateway location to the town.
Servicing	The tight urban street pattern and the steep gradient of the site could present problems for servicing, however, it is important that servicing to surrounding properties is not compromised by redevelopment.
Difficulties with displacing existing uses	This site contains a number of residential properties and the service yard to the Westgate Department store, both these uses will be difficult to displace. Likely that redevelopment will require reorganisation of some on-site uses.
Environmental impacts	No onerous impacts envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The town centre location means this site is ideal, in principle, for retail use (along with other residential and commercial uses), although its current separation from the core retail area may constrain the level of retail uses which can be provided.
Development Costs	Likely to be increased by the purchase of residential properties, if required for comprehensive redevelopment.
Timescale	Medium to long term
Commercial Attractiveness	Prominent location indicates that this site is likely to be attractive for a range of uses (depending on outcome of site acquisition issues). Improved linkages to High Street would also increase the commercial attractiveness of this location.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site is large enough to accommodate some retail floorspace, depending on commercial attractiveness and the other land uses proposed for the redevelopment of this site.
Trade Draw	Retail uses in this location have the potential to provide a positive impact on the town centre.

CONCLUSIONS

Overall Conclusions:
This is prominent and key town centre site in Cinderford, with the potential to provide significant additional floorspace for the town centre and a gateway development at the entrance to the town centre. The existing uses, particularly the residential properties will be difficult to displace, and also a large proportion of the site is actively use as the service yard to the Westgate Department Store. We would also support the suggestion a mixed commercial development providing new accommodation for the Police Station currently on the site. Given its location to the rear of Market Street, significant levels of retail use may not be feasible in this location.

SITE 12: LIBRARY CAR PARK, NEWENT

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Located within Newent town centre
Site area / size	0.13Ha
Existing land-uses	Surface level car park, in poor condition, servicing adjacent community uses and town centre generally. Vehicle access from Watery Lane and pedestrian access via Broad Street.
Adjoining land-uses	Police Station and health centre to north, residential to the west and core town centre to the south
B. PLANNING POLICY ISSUES	
Planning Policy Status	Covered by a wider allocation (covered land to the west of Broad Street) under Policy (R)F.Newent 2 in adopted Local Plan for residential, retail, commercial and community use. Allocation requires existing car park to the rear of the library to be improved. Within Newent's Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good, via Watery Lane.
Accessibility by a choice of means of transport	Given town centre location, access to public transport and pedestrian routes is very good.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Access should be via Watery Lane and will need to be updated to support redevelopment proposals.
Parking	At present, site provides a well used parking facility. Redevelopment for other uses will need to demonstrate that sufficient parking capacity exists elsewhere in the town centre to accommodate demand.
Impacts on neighbouring properties / land	Redevelopment will need to provide access to library, police station and adjacent community uses.
Visual Impact (Quality of development required)	Within Conservation Area, so high standard of design will be required.
Servicing	Redevelopment will need to provide access to library, police station and adjacent community uses.
Difficulties with displacing existing uses	Redevelopment will be dependant on need to retain site for parking use.
Environmental impacts	n/a
Other	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Acquisition Costs	No abnormal costs envisaged.
Development Costs	No abnormal costs envisaged.
Timescale	Short to medium term opportunity.
Commercial Attractiveness	Site is likely to be of moderate interest to retailers, although it is separated from the primary retail area.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	There is an opportunity to reasonably large retail unit on this site (if parking provision can be removed) which may not be an option for the other sites surveyed in Newent town centre. Therefore, this site has the opportunity to meet part of the identified need.
Trade Draw	Retail development on this site has the potential to provide a positive impact on the attractiveness of Newent town centre, although this is dependant on removal of parking use being acceptable (which could affect attractiveness).



CONCLUSIONS

Overall Conclusions:

This is an unattractive site within the northern part of Newent town centre which currently accommodates a well used free public car park. Historic studies have indicated that removal of this parking facility will not have a detrimental impact on the availability and supply of parking within the town centre as a whole and, on this basis, there is an opportunity to redevelop this site for other uses. Other sites in Newent town centre examined within this analysis are constrained in terms of size and format and therefore this site may offer the opportunity to provide a slightly larger retail or commercial unit. However, in order for the site to be commercially attractive, easy linkages with the primary retail area must be maintained.

SITE 13: REAR OF BROAD STREET, NEWENT

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Newent town centre
Site area / size	0.10Ha
Existing land-uses	A combination of vacant land, parts of buildings fronting on to Broad Street and private parking areas.
Adjoining land-uses	Retail and commercial properties (included within primary retail frontages) abut the western edge of this site. Town museum to the east.
B. PLANNING POLICY ISSUES	
Planning Policy Status	Site is not allocated for any specific land uses within adopted Local Plan, although site is within town centre boundary. Within Newent's Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	Reasonable accessibility via unnamed road linking Court Lane to Good News Centre car park, although highway is narrow in places.
Accessibility by a choice of means of transport	Given town centre location, accessibility on foot and public transport is good, although direct linkages cannot currently be made with High Street and Broad Street.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Unlikely to be a significant constraint, although narrow nature of adjacent highway may constrain access.
Parking	A small amount of parking may be accommodated on this site although this is likely to be restricted to occupiers only.
Impacts on neighbouring properties / land	The key potential impact is likely to be on the adjacent properties fronting on to Broad Street. Rear access and servicing may be affected.
Visual Impact (Quality of development required)	At present, site is unattractive and has considerable scope for improvement. There is an opportunity to introduce a new street frontage in this area.
Servicing	Key consideration will be the need to maintain or adequately revise servicing arrangements for properties along Broad Street.
Difficulties with displacing existing uses	There appears to be low levels of use across this site, associated with occupiers along Broad Street. These will need to be revised if redevelopment can proceed.
Environmental impacts	n/a
Other	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Acquisition Costs	Site is in a number of ownerships which may increase acquisition costs
Development Costs	No abnormal costs envisaged.
Timescale	Medium term opportunity
Commercial Attractiveness	At present, site only has moderate commercial attractiveness as a retail location, although a co-ordinated framework will improve confidence (e.g. Newent environmental enhancement feasibility study)
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	Likely to meet only a small part of the identified need for new retail floorspace in Newent.
Trade Draw	Potential for a positive impact on the health and attractiveness of Newent town centre.

CONCLUSIONS

Overall Conclusions:

This is a neglected backland site within Newent town centre which currently does not contribute to the attractiveness of this part of the town centre. Within the Newent environmental enhancements feasibility study this site is identified as having potential to accommodate new buildings for a mixture of uses and we would support this approach. Co-ordinated development of this site and redevelopment of the Shambles area has the potential to introduce a new route through the town centre, which will open up this part of the centre. Retail uses within the ground floor of any new buildings on this site would be acceptable.

SITE 14: THE SHAMBLES AND REAR PARKING AREA, NEWENT

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Located within Newent town centre
Site area / size	0.39Ha
Existing land-uses	Retail units fronting on to Church Street, plus surface level parking and surfacing area to rear (including garages)
Adjoining land-uses	St Marys church to east, plus retail and commercial uses on all other sides.
B. PLANNING POLICY ISSUES	
Planning Policy Status	Not allocated for any specific land use within adopted Local Plan, although site lies within defined town centre boundary and partially within primary retail frontages. Within Newent's Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	Reasonable access, although due to town centre location vehicular access can be constrained. Church Street is narrow in places and traffic congestion occurs. Main vehicle access will be from the rear of site, via Court Lane.
Accessibility by a choice of means of transport	Given town centre location, access by public transport and on foot is considered to be good.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Newent town centre's street pattern is historic in nature and access is likely to be from Court Lane only. The need to access the site from Court Lane will also influence how the site is redeveloped.
Parking	Parking provision can be accommodated on site, although this is likely to be for occupiers rather than for shoppers.
Impacts on neighbouring properties / land	Redevelopment of part of site could have an impact on neighbouring properties on Church Street and Market Square and their servicing arrangements.
Visual Impact (Quality of development required)	Site is within Newent Conservation Area and is within an historic part of the town centre. Therefore, careful design approach will be required which maintains and enhances the historic street pattern.
Servicing	The rear part of this site is used to service properties Church Street and Market Square. These arrangements will need to be maintained or revised in an acceptable manner.
Difficulties with displacing existing uses	Site currently accommodates a number of retail and commercial uses which will need to be either maintained or relocated as part of any redevelopment scheme.
Environmental impacts	n/a
Other	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Acquisition Costs	Given the number of potential ownerships in this area, acquisition costs may be increased.
Development Costs	No abnormal costs envisaged.
Timescale	Medium term opportunity
Commercial Attractiveness	Likely to be an attractive opportunity for a mixed use development
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	
Trade Draw	Retail uses in this location have the potential to have a positive impact on Newent town centre

CONCLUSIONS

Overall Conclusions:

The key focus for this site is the ability to redevelopment and provide additional land uses into the northern part of this site. in our opinion, this site is likely to be suitable for a mixture of uses including retail, commercial, leisure and residential uses, although retail uses are only likely to be attractive if linkages with existing retail frontages can be provided and pedestrian footfall can be attracted along Court Lane and/or through existing properties on Church Street. We consider that the Court Lane frontage of this site offers the best opportunity to provide retail uses and can open up a new retail route within the town centre where the land to the rear of Broad Street (see site x later in this section) also provides retail and commercial uses. It is likely that the central northern and eastern parts of the site are better suited to residential and non-retail uses and should be arranged in such a form that access and servicing to properties on Market Square and Church Street is maintained.

GVA Grimley
International Property Advisers

SITE 15: COACH & CAR PARK, OLD STATION WAY, COLEFORD

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Coleford town centre
Site area / size	0.39Ha
Existing land-uses	Coach and car park and recycling collection point
Adjoining land-uses	Residential, museum and health centre
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located within Coleford town centre boundary but separated from the core retail area. The site is also surrounded by Policy (R)FBE.8 – Important Open Area. It is understood that this site has been suggested as a potential location for a community centre, which could also contain a commercial element (which is likely to be some modest office accommodation).
C. ACCESSIBILITY	
Accessibility by private car	Very good access by car, situated on the main route into Coleford town centre.
Accessibility by public transport	Public transport services are a short walk from this site.
D. CONSTRAINTS TO DEVELOPMENT	
Access	No onerous constraints envisaged.
Parking	Loss of car parking must be acceptable for redevelopment to occur.
Impacts on neighbouring properties / land	Good quality design and consideration of the height in relation to the neighbouring residential properties to the south will be important.
Visual Impact	At present this site does not contribute to the overall appearance of the area and as prominent site on the approach to Coleford town centre high quality design should be a policy criterion for the redevelopment.
Servicing	No onerous constraints envisaged.
Difficulties with displacing existing uses	At present the site provides coach and car parking (and a recycling collection point). The parking is not the most convenient for the town centre although its loss will need to be acknowledged (and potentially re-provided for elsewhere) for redevelopment to occur.
Environmental impacts	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	This site offers the opportunity for a range of land uses although it is somewhat detached from the retail core. If more legible links with Pyart Court can be created as part of the redevelopment of this site, this would make the site a more appropriate location for retail. The proposal for a community centre with other commercial uses could be appropriate for this site, particularly with the slightly peripheral location of the site in relation the rest of the town centre. Modest office accommodation would be acceptable in this location, however retail in this location would not be a preferred use due to the separation of the site from the rest of the town centre and there are sequentially more appropriate sites elsewhere in the centre.
Development Costs	No onerous costs envisaged.
Timescale	Short to medium term opportunity.
Commercial Attractiveness	The high visibility and good accessibility of this site on the approach to Coleford town centre are likely to make this a commercially attractive site for retail/mixed-use development.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	There is scope for this site to meet a proportion of the retail need for Coleford, although sites closer to the town centre are available which should take priority.
Trade Draw	Provided links to the existing retail areas can be provided this site has the potential to have a positive impact on retailing in Coleford town centre.

CONCLUSIONS

Overall Conclusions:
This is a highly visible and accessible site which is currently used for parking purposes (within the town centre boundary of Coleford). At present, this facility has moderate levels of usage, as other more central parking areas exist. The site is currently detached from the existing core retail areas in the town centre and pedestrian linkages with the centre have scope for considerable improvement. For retail uses to be acceptable on this site, we recommend that a wider series of pedestrian movement improvements are pursued by the Council. In addition, it should be noted that this is not the most sequentially preferable site in Coleford and retail uses will only be acceptable where the aforementioned issues are resolved and the proposed retail uses cannot be accommodated on the alternative sites. We consider that the proposal for a community centre on this site is suitable, given the location of the site in relation to the town centre and is preferred over retail-led development in this location.

SITE 16: LAWNSTONE HOUSE & THE BUNGALOW, HIGH STREET, COLEFORD

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Coleford town centre
Site area / size	0.14Ha
Existing land-uses	Residential and Council Offices
Adjoining land-uses	FODDC offices, retail and other town centre uses
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located within Coleford town centre boundary and immediately opposite the primary retail frontage.
C. ACCESSIBILITY	
Accessibility by private car	Access via High Street junction with main FODDC offices, albeit within a reasonably congested town centre environment.
Accessibility by public transport	Public transport services are a short walk from this site.
D. CONSTRAINTS TO DEVELOPMENT	
Access	No significant constraints to redevelopment.
Parking	This is relatively small site, therefore significant on-site parking is not possible, although there is a large public car park opposite the site.
Impacts on neighbouring properties / land	Relatively self-contained site, therefore impact on surrounding uses should be minimal.
Visual Impact	This is a visible site from the Market Place and High Street, which currently encloses the view from High Street, therefore the high quality design should be a firm aspiration for this site.
Servicing	No significant constraints envisaged.
Difficulties with displacing existing uses	Assuming the Council use can be re-accommodated elsewhere, this site can potentially be made available for redevelopment.
Environmental impacts	No onerous impacts envisaged
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	There are opportunities for a mixture of uses on this site, including retail and commercial uses at the ground floor, plus retention of existing office uses and residential accommodation above.
Development Costs	No onerous costs envisaged.
Timescale	Medium term opportunity.
Commercial Attractiveness	The High Street location of this site will makes it commercially attractive for both retail, residential and office development.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	In light of the prime location of this site, it is well place to meet a retail need for Coleford, providing a natural extension to the retail core along High Street.
Trade Draw	Retail development on this site will have a positive impact on the vitality and viability of Coleford town centre.

CONCLUSIONS

Overall Conclusions:

This is a prominent site within Coleford town centre, currently in office use. Redevelopment will depend on the ability to relocate the existing FODDC office accommodation elsewhere. Assuming this site can be made available, it offers an opportunity to provide a natural extension to the retail core, which would have a positive impact on the vitality and viability of Coleford town centre. The options for a mixed-use redevelopment of the site should also be considered, as office and residential accommodation could be provided on the upper floors with retail on the ground floor.

SITE 17: FRONTAGE OF LIBRARY SITE, BANK STREET,COLEFORD

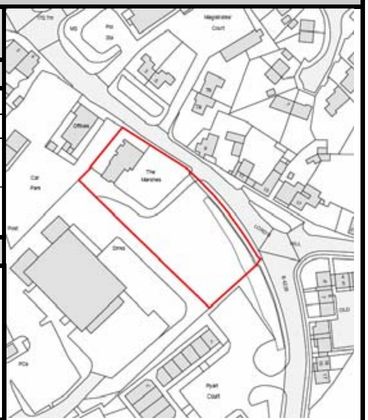
ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Coleford town centre
Site area / size	0.86Ha
Existing land-uses	Library and Community & Youth Centre, plus car parking provision
Adjoining land-uses	Retail and other town centre uses. Some residential to rear of site.
B. PLANNING POLICY ISSUES	
Planning Policy Status	No site specific policy allocation. Located within Coleford town centre boundary. Outside the conservation area.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good access via Bank Street.
Accessibility by public transport	Public transport services are a short walk from this site.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Given that site currently generates a number of vehicle trips for the existing on-site use, onerous access constraints envisaged.
Parking	This site is large enough to accommodate some on-site parking as park of a redevelopment scheme.
Impacts on neighbouring properties / land	Some residential properties overlook the rear of this site so any new buildings in this location will need to carefully designed.
Visual Impact	No negative impacts envisaged, provided consideration is given to the amenity of neighbouring residential properties. Bank Street frontage of site is poor and there are opportunities for a redevelopment scheme to provide a much better frontage.
Servicing	No onerous constraints envisaged.
Difficulties with displacing existing uses	At present the site is occupied by the town's library and a Community and Youth Centre, plus a public car park. For redevelopment to occur these uses will need to be relocated or re-accommodated on site.
Environmental impacts	No onerous impacts envisaged.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	This site offers the opportunity for a range of uses, including some retail, plus community, residential and office accommodation. The site is slightly detached position from the retail core, and separated by the highway network, indicating that significant amounts of retail accommodate may not be a suitable approach.
Development Costs	On site development costs unlikely to be more than average, although cost of relocating library and community uses will increase overall development budget.
Timescale	Medium term opportunity.
Commercial Attractiveness	The town centre location and size of this site is likely to make it commercially attractive for a retail/mixed-use development.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	In light of the town centre location and the size of the site there is scope, in principle, for a reasonable amount of retail floorspace to be accommodated on this site.
Trade Draw	As a town centre site, retail development in this location may have a positive impact on the vitality and viability of Coleford town centre, although site is detached from primary retail area and therefore may not provide suitable linkages.

CONCLUSIONS

Overall Conclusions:
This is a reasonable large site within Coleford town centre, although it is somewhat detached from the main retail core due to the need to cross a number of busy roads. The size and location of this site are likely to make it commercially attractive for a redevelopment scheme to include a mixture of uses. Availability for redevelopment will depend on the ability to relocate the existing uses elsewhere or re-accommodate them on site. Given the separation of this site from the primary retail core, and the potential suitability of other sites within the town centre for retail uses, we do not consider that this site should be considered as a primary retail development site (unless significant revisions can be made to linkages between this site and the primary retail core).

SITE 18: THE MARSHES, LORDS HILL, COLEFORD

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Within Coleford town centre
Site area / size	0.38Ha
Existing land-uses	Vacant land.
Adjoining land-uses	Co-op foodstore to the west, Pyart Court to the south, Coleford town centre core retail area to the west and residential uses to the east.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site is currently allocated for retail and residential uses within adopted Local Plan. Located within Coleford town centre boundary.
C. ACCESSIBILITY	
Accessibility by private car	Good access via Old Station Way and Lord's Hill, albeit within a reasonably congested town centre environment.
Accessibility by public transport	Public transport services are a short walk from this site.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Current access from Lords Hill will need to be improved as part of any redevelopment scheme and access options from Railway Drive and Pyart Court should also be considered. Opportunity to provide new access for town centre car parks and remove traffic from the town centre.
Parking	A reasonable large site which could accommodate on-site parking and may also be use adjacent parking provision at Railway Drive.
Impacts on neighbouring properties / land	There is an opportunity here to significantly improve the relationship of this site with surrounding properties and provide a better pattern of movement around the town centre. Opportunities for linkages with the adjacent Pyart Court should be investigated, as this could assist is developing the better pattern of movement in the town centre.
Visual Impact	Highly visible town centre site which is currently likely in a poor state. Therefore, there is an opportunity to significantly improve the appearance of this site and the contribution it makes to the overall attractiveness of the town centre.
Servicing	No onerous constraints envisaged, although comments in relation to 'access' (above) will also apply to servicing. It would be ideal if servicing of any future unit(s) could be between the existing Co-op unit and the a new unit(s) which should front on to Lords Hill, which would improve the attraction of the approach into the town centre.
Difficulties with displacing existing uses	No uses to be displaced.
Environmental impacts	An ecological survey may be required as part of any redevelopment proposals for this site.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	In line with the existing Local Plan allocation, the location of this site indicates that it is suitable for a range of uses including retail.
Development Costs	No significant costs envisaged, although sloping nature of site may increase costs.
Timescale	Short to medium term opportunity.
Commercial Attractiveness	We consider that this site will be commercially attractive for a range of uses. The lack of implementation of the existing Local Plan allocation should not necessarily be taken as a sign that this site is not deliverable for retail uses.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	In light of the existing retail allocation and the town centre location, this site is well placed to meet some of the retail need identified for Coleford town centre.
Trade Draw	As a town centre site, provided good links to existing retail are put in place retail development in this location would have a positive impact on the vitality and viability of the town centre.



CONCLUSIONS

Overall Conclusions:
This is a prominent vacant site within Coleford town centre, which has the benefit of an existing retail allocation within the adopted Local Plan and lies close to other retail and commercial development in the town centre. However, this area has poor pedestrian linkages with the remainder of the centre and any redevelopment scheme on this site should seek to improve linkages to ensure that retail and other land uses in this location act as part of the town centre. In particular, we would suggest that consideration is given to how the Railway Drive car park and surrounding retail properties can be re-organised and improved to enable this site to act as a logical extension to Coleford town centre. It is therefore recommended that this site should continue to the allocated within the Forest of Dean LDF although clearer guidance of the expected form of development and improvements to surrounding areas should be provided.

SITE 19: CINDERFORD RUGBY CLUB, DOCKHAM ROAD, CINDERFORD

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	Located to the north of the core retail and commercial area in Cinderford town centre
Site area / size	2.77ha
Existing land-uses	Rugby club pitch, spectator areas, parking areas and access.
Adjoining land-uses	Co-op foodstore to the west and residential uses to the north, east and south.
B. PLANNING POLICY ISSUES	
Planning Policy Status	Located within defined town centre boundary in Cinderford and allocated as a protected outdoor recreation space under Policy (R)FBE.10 in the adopted Local Plan.
C. ACCESSIBILITY	
Accessibility by private car	Reasonably good via Dockham Road, although Dockham Road is narrow in places and will require upgrading.
Accessibility by public transport	Close to bus station, so accessibility is very good.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Access via Dockham Road will require upgrading if retail development is provided on this site.
Parking	Site is large enough to accommodate on-site car parking.
Impacts on neighbouring properties / land	Site is located close to a number of residential properties, so careful design approach will be required. In addition, access into the site will need to work successfully with the adjacent Co-op site entrance access.
Visual Impact	Site lies in an elevated position and retail development in this location will be highly visible.
Servicing	Same issues as access (see above)
Difficulties with displacing existing uses	In order for redevelopment to occur, existing rugby club use will need to be relocated.
Environmental impacts	n/a
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Site is potentially suitable for retail uses, depending on the scale of proposal and linkages with the core retail area.
Development Costs	Likely to be increased by the need to find a alternative site for the existing rugby club use.
Timescale	Medium term opportunity.
Commercial Attractiveness	Site is clearly attractive for retail development, as evidenced by the recent Tesco proposals on this site.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site has the ability to meet a significant part of the identified need for Cinderford, particularly convenience goods retail floorspace.
Trade Draw	Retail uses on this site have the potential to provide a positive impact on the health of Cinderford town centre, although the trade diversion of individual schemes will need to be considered carefully. In addition, a positive impact on the town centre will only accrue where there is clear and easy linkages with the core retail area.

CONCLUSIONS

Overall Conclusions:

The Cinderford Rugby Club site has long been promoted as a potential supermarket development site and there have been recent planning applications by Tesco for a large store in this location (subsequently quashed by the High Court). This site lies within the town centre boundary in Cinderford (although outside of the primary retail frontage) and therefore is in a potentially suitable location for retail development, subject to the tests of scale and retail impact. Potentially, retail uses on this site could be a short walk from the primary retail frontages in Cinderford, although suitability of any retail proposals on this site will ultimately depend on their size and scale plus the layout of the site and the pedestrian linkages which the development offers along Dockham Road. At present, ease of pedestrian movement along Dockham Road is constrained by the Co-op site entrance and the bus station areas and any future application will need to satisfy the Council that pedestrian movement can be considerably improved.

6.15 The opportunities offered by these sites are now taken forward into an assessment of the broad policy options for retailing in the Forest of Dean.

Different Approaches to Retail Development in the Forest of Dean: The Options

Introduction

6.16 In light of the contents of PPS6, the results of the needs assessments and the locational analysis must be the starting point for the options analysis. These analyses contain a detailed and up-to-date assessment of current locally-generated expenditure and shopping patterns for a range of goods, plus an assessment of the development potential of individual locations in each town centre. Both of those pieces of work will help guide the future potential of retailing in the Forest of Dean. The strategic options presented here for detailed discussion all have (in varying degrees) embedded within them the framework provided by the needs and locational analyses. Accordingly, at the most simple level, two broad strategic options exist:

- The ‘constant market share’ approach. This scenario uses the results of the needs and locational assessments and assumes that existing shopping patterns, revised to take into account already committed developments, will continue at the same level over the lifetime of the LDF. Within this option the aim is to maintain current market share and identification of sites for additional retail development (as identified earlier in this section) will only be identified when prompted by the constant market share quantitative analysis in Section 5 of this report.
- The ‘revised market share’ approach. This approach recognises that individual settlements may face pressures, from various directions, to increase retail provision. Some of these pressures may have been identified in the qualitative and town centre health check analyses. The ‘revised market share’ approach responds by exploring the potential for retail provision in the Forest of Dean to retain a greater level of retail expenditure in the future and the implications that this will have on the Core Strategy in FODDC’s LDF.

6.17 Applying these two options across the Forest of Dean as a whole raises concerns about the dangers of applying a ‘one size fits all’ approach. As can be seen from the contents of Sections 4 and 5, there are significant differences between individual settlements, which are also borne out by the research findings. Therefore, different characteristics must be reflected in any options analysis and strategy development. There are also differences between different types of shopping in the same settlement and the options analysis must take account of this. Therefore, the options analysis examines the four principal towns in turn and, as a result, will lead to individual options being recommended for each centre and different types of retailing within that centre. Drawing these options together provides the Council with a district wide retail strategy, which considers the inter-relationships of the four principal towns. In particular, the options analysis considers convenience and comparison retailing in each chosen settlement separately, whilst bulky goods retailing is also considered within the comparisons goods category.

6.18 Accordingly, the options analysis should be seen as a ‘menu’ from which to choose, depending on the specific area of interest. This approach accords with guidance contained within PPS12 (2008) which requires the preparation of development plan documents to seek out and evaluate reasonable alternatives in order to arrive at the most appropriate strategy.

6.20 Clearly, the two policy options assessed here for each settlement are not intended to be an exhaustive list of all strategy options. Within the ‘revised market share’ approach, many individual sub-scenarios, based on different levels of potential market penetration, may exist. Also, due to the inter-relations of the four principal towns, changes in one centre will inevitability impact on the growth potential of others, and this is analysis further below. The different sub-scenarios can only be fully explored once further detailed analysis is undertaken on potential development locations/sites. In any event, local planning authorities will invite alternative proposals during consultation on development plan document, and this is likely that consultation with stakeholders will be the most appropriate opportunity to explore additional options.

6.21 Therefore, in the analysis which follows, both options for each settlement are assessed against the suite of policy objectives which were summarised at the start of this section and in Section 2 of this report. The result of this analysis, which is contained overleaf, will enable a preferred option for each type of retail provision within each settlement to be recommended. The analysis of each centre is structured on a settlement-by-settlement basis with the ‘constant market share’ and ‘revised market share’ options for each type of retail goods provision considered side-by-side.

Preferred Options for Retailing in the Forest of Dean

6.22 Having regard to the preceding options analysis, a number of conclusions can be drawn in relation to the preferred options for retailing in each of the principal settlements. However, before considering the different policy options for each town, we provide an overarching retail strategy for the District as a whole, which draws upon (and is consistent with) the different policy options for the individual towns.

District-wide Retail Strategy

6.23 The four main towns within Forest of Dean District provide a very important service to the local population and each has a localised core catchment area. Each town has a modest selection of retail and service uses which are able to retain food and non-food shopping trips from the local population, although retention levels for non-food shopping in each town are relatively low and significant leakage exists to the larger centres of Gloucester, Cheltenham and Bristol. This is not a unique problem to the Forest of Dean and many other small market towns across the South West of England which lie in close proximity to sub-regional centres also possess similar issues.

6.24 In terms of convenience shopping, retention levels are generally higher, particularly in Lydney, which has a good range of facilities. However, Coleford, Cinderford and Newent are not able to retain high levels of main/bulk-food convenience shopping trips and trips are 'leaking' to either Lydney or facilities in surrounding settlements.

6.25 In response to these issues, our recommended retail strategy for the four main Forest of Dean towns is based on better retention of retail expenditure, particularly comparison goods and main food shopping trips. The detailed analysis contained in the preceding policy options analysis and summarised below outlines the strategy for each settlement. Overall, the strategy indicates that each of the main towns has the ability to improve and grow its retail offer, although it would be unrealistic for the Council to expect the towns (either individually or collectively) to compete directly with centres such as Gloucester, Cheltenham and Bristol given the size and attractiveness of those centres.

6.26 In terms of the distribution of additional retail floorspace over the LDF period, we consider that each of the four towns has an important role to play in serving their local population and the rural hinterland and, therefore, each should benefit from a growth in retail floorspace. However, due to their role and position, some of the settlements may have the opportunity to experience higher levels of growth than others, in order to meet the needs of its current and future population. In line with the current settlement hierarchy that has established over time in the Forest, this study recommends that the highest levels of growth and change are directed towards Lydney and then

Cinderford and Coleford and then lower levels of growth and change for Newent. This is in line with the focus of growth in Lydney within the forthcoming LDF documents. In the analysis which follows, we outline these potential increases for each settlement.

6.27 We now consider in detail the retail policy options for each of the towns in turn.

The Future of Retailing in Lydney – Consideration of Alternative Options

This analysis considers the alternative options for retail development strategy in Lydney. Two alternative strategies are considered. The first is a 'constant market share' approach, which bases the retail strategy, and the need to make further land use allocations, on the continuation of existing market penetration rates. The basis for the 'constant market share' approach is contained in the quantitative analysis in Section 5. The second approach examines the potential and/or desirability of a 'revised market share' approach in Lydney. It seeks to explore the implications of an amended market penetration rate, influenced by both internal and external factors to Lydney and the Forest of Dean District, for retailing in Lydney. The potential floorspace capacity implications of each approach are set out below.

	'Constant market share' Approach	'Revised Market Share' Approach
Floorspace Capacity Requirements for the Two Options:	In terms of convenience goods capacity, the constant market share approach indicates that there will be a quantitative need for 290sq m of additional convenience goods floorspace by 2012, rising to 620sq m in 2021. For comparison goods retailing, maintaining a constant market share will provide a limited quantitative need for 230sq m net by 2012, rising to 1,050sq m net comparison by 2021.	We have explored the possibility and desirability of pursuing an increase in the market share of Lydney within its local catchment area (Zone 1) to allow additional provision to be provided over the LDF period. At present, Lydney has a local market share of 78% and 73% for maim food and top-up shopping trips respectively and we have tested the impact of an increase to 90% retention for Zone 1 (with all other flows remaining the same). This would provide capacity for 723sq m net by 2012, rising to 1,090sq m net by 2021. However, a further consideration will be the effect that new floorspace elsewhere will have on future capacity in Lydney. For example, additional facilities in Cinderford and Coleford could eliminate additional capacity in Lydney. In terms of comparison goods floorspace capacity, we have explored the desirability and policy compliance of a scenario where an increase in Lydney's retail market share is pursued. At present, 21% of locally generated expenditure from Zone 1 is retained by Lydney and we have tested reasonable possibility that this could increase to 30% in the future. This level of retention from Zone 1 (assuming inflow from other zones remains the same) suggests a capacity of 1,350sq m net by 2012, rising to 2,450sq m net by 2021.

Policy Document	Policy Objective / Strategy	'Constant market share' Approach		'Revised Market Share' Approach	
		Convenience	Comparison	Convenience	Comparison
PPS6	Qualitative Need	We have found that there is little overall qualitative need for additional convenience floorspace in Lydney. Therefore, maintaining a constant market share is unlikely to conflict with any objectives.	The level of additional comparison floorspace identified in the constant market share approach is likely to provide an improvement to the range of comparison retail provision in Lydney in the longer term and therefore meet the need to improve the range and quality of provision in the town. However, in the short term, relatively low levels of additional provision are indicated, which may not satisfy current qualitative deficiencies.	There is limited qualitative justification for an uplift in the market share of convenience retailing in Lydney, given level of existing provision. Furthermore, attempts to increase Lydney's market share could be to the detriment of securing qualitative improvements in other Forest towns.	There is a qualitative case for an increase in comparison floorspace in Lydney, although such increases should realistic in terms of the potential role and function of the town. We consider that sensible increases in the level of locally generated expenditure retained by Lydney can be supported by qualitative indicators.
	Appropriate Scale of Development	The lack of signinficant need for additional convenience floorspace will not conflict with prevailing retail policies in relation to scale.	In our view, the level of additional floorspace provided for in the constant market approach to comparison retail provision will not conflict with the appropriate scale of development for Lydney.	The level of additional convenience floorspace within this scenario is unlikely to conflict with the test of scale for Lydney itself, although it may have an impact on the distribution of convenience provision elsewhere in the District.	We consider that modest increases in the market share of Lydney can sit comfortably with the scale of retail provision in the town.
	Sequential Approach to Site Selection	The lack of significant need for additional convenience retail floorspace in Lydney will not conflict with prevailing policies in relation to the sequential approach to site selection.	By 2021, a moderate increase in comparison floorspace will be provided for. Whilst a detailed assessment of the physical capacity of individual opportunity sites has not been undertaken, we consider there is every opportunity for town centre sites in Lydney to accommodate the identified need.	In line with the sequential approach to site selection, the additional space should be provided for on one of the development opportunity sites identified within this report, or as part of an extension to one of the main town centre foodstores.	Whilst a physical capacity assessment of potential sites has not been undertaken, we consider that the level of additional comparison floorspace identified within this scenario has the potential to be accommodated within town centre locations.
	Potential Impact	The low levels of additional floorspace outlined in this scenario will not raise any impact issues for existing floorspace	At present, comparison floorspace within Lydney town centre is trading reasonably well and assuming that the new provision can be accommodated within the existing centre or as an appropriate extension to the centre, then we foresee no significant retail impact concerns. However, if a significant part of this additional provision is provided in edge and out-of-centre locations then impact issues may arise and will need to be given careful consideration.	The level of additional floorspace identified within this scenario is limited and is unlikely to have a detrimental impact on the health of Lydney town centre. However, impacts may arise on other main town centres in the Forest if further convenience provision in Lydney is allowed.	In terms of impact, the level of increase proposed in this scenario is significant and additional provision must be provided within town centre locations in order to support the pursuit of the revised market share route. If part of the revised market share capacity is provided in locations which are separated from the town centre, then there is a distinct possibility that a negative impact could occur on Lydney town centre.
	Ensure Locations are Accessible	All convenience goods floorspace in Lydney is currently located within the town centre and, therefore, is considered to be highly accessible.	The key objective will be to provide the vast majority of additional space in the town centre, where it can benefit from a choice of means of transport. If edge or out-of-centre locations are proposed, the District Council will need to ensure that it can be accessed by public and private transport.	To aide accessibility, new should be located within Lydney town centre, to reinforce existing town centre foodstore provision.	In line with the above analysis, there is a fear that significant out-of-centre provision could be contrary to policy. In terms of accessibility, out-of-centre provision may inhibit some groups in society from visiting new provision. Therefore, the revised market share approach should only be pursued where additional provision can be provided in highly accessible town centre locations.
Regional Planning Guidance for the South West (RPG10) and Draft RSS	(RPG10) Policy EC6: Town Centres & Retailing & (draft RSS) Policy TC1	Lack of additional significant provision will not conflict with the objectives of regional policy, although the District Council should ensure that town centre provision should be maintained and enhanced in the future.	In our opinion, the level of floorspace proposed under the constant market share scenario for comparison goods retailing is commensurate with the objectives for a town such as Lydney in the draft RSS and the broad objectives of RPG10 (such to sequential approach and impact issues).	There is little support from either the RSS or RPG10 for an increase in convenience provision in Lydney, although a modest increase in town centre provision is unlikely to conflict with regional strategy.	Compliance with the draft RSS strategy and RPG10 will depend on the ability to provide this additional space within the town centre. If it cannot be provided, then a constant market share approach may be more acceptable.
Gloucestershire Structure Plan	Policy TC2	The lack of need for additional space will not conflict with the objectives of retail and town centre policy in the Structure Plan.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.

Lydney

6.28 There is a good level of provision within the convenience sector in Lydney, including Tesco, Co-op and Somerfield stores plus a range of local independent operators. The quantitative analysis has shown that the convenience sector within the town is dominated by the Tesco store, which is the most popular main/bulk-food shopping destination in the District. As already noted, a continuation of the existing market share for Lydney's convenience facilities over the LDF period would not allow for any significant growth. Given that around three-quarters of locally generated convenience goods expenditure remain within the town, there is a potential for additional trip retention by local stores (where a wider/better of facilities is provided). However, any increases within the local area (Zone 1 of the study area) are likely to be cancelled out where better facilities are provided within Cinderford and Coleford, given that significant current expenditure flows from these towns will be stopped if/when new facilities are provided. In addition, a significant expansion of convenience retail floorspace in Lydney has the potential to prejudice the improvement of convenience facilities in Coleford and Cinderford.

6.29 However, the assessment of need does not necessarily stop at quantitative indicators and additional provision may be justifiable where it can be provided within the town centre and it shows a qualitative improvement to overall provision in Lydney (along with compliance with other policy tests – e.g. impact). These improvements may come in the form of expansion of existing facilities, or the inclusion of modest convenience floorspace within the potential redevelopment of the Paramount Garage site may be an example of this approach. Overall, we do not recommend a significant intervention by FODDC in the convenience retail sector in Lydney and pursuit of a constant market share approach is the most acceptable strategy for convenience retailing.

6.30 In relation to comparison goods shopping, the existing market share of Lydney is reasonably low, due to leakage to Bristol and Gloucester, although it remains the highest of all the Forest towns. Should the existing market share of comparison shopping continue in the future, only limited amounts of additional floorspace capacity will be available, which may constrain the ability of the town centre to grow and serve its local population. We have therefore tested a revised market share approach where there is a strategy to retain greater levels of locally-generated comparison expenditure in Lydney. This approach is supported by the need to improve the qualitative offer of retail facilities in the town and to support the inclusion of retail floorspace within the redevelopment town centre sites (e.g. Paramount Garage site, Newerne Street). Based on the theoretical ability to increase the comparison shopping market share of Lydney in Zone 1 (in which it sits) from 21% to 30%, there is a potential for an additional 1,350sq m net by 2012 rising to 2,450sq m by 2021. We recommend that a revised market share approach for comparison retailing should be pursued, but only where the additional provision is located within the town centre. Therefore, given that the revised market share approach is dependant on the deliverability of town centre sites, our recommended levels of comparison floorspace capacity for Lydney are shown as a range of additional floorspace levels (range from the constant market share as a minimum, up to the revised market share as a maximum). This will assist Lydney in competing more successfully with centres outside the District and clawing back local expenditure which is currently leaking to centres outside the district.

The Future of Retailing in Cinderford – Consideration of Alternative Options

This analysis considers the alternative options for retail development strategy in Cinderford. Two alternative strategies are considered. The first is a 'constant market share' approach, which bases the retail strategy, and the need to make further land use allocations, on the continuation of existing market penetration rates. The basis for the 'constant market share' approach is contained in the quantitative analysis in Section 5. The second approach examines the potential and/or desirability of a 'revised market share' approach in Cinderford. It seeks to explore the implications of an amended market penetration rate, influenced by both internal and external factors to Cinderford and the Forest of Dean District, for retailing in Cinderford. The potential floorspace capacity implications of each approach are set out below.

Floorspace Capacity Requirements for the Two Options:

'Constant market share' Approach	'Revised Market Share' Approach
In terms of convenience goods capacity, the constant market share approach indicates that there will be quantitative need for 925sq m net by 2021. For comparison goods retailing, maintaining a constant market share will provide a quantitative need for additional 220sq m net by 2012, 500sq m net by 2016 and 1,100sq m net by 2021.	Within Cinderford, it is acknowledged that there is an opportunity to pursue a revised convenience retail market share in order to promote the retention of more main/bulk-food shopping trips within the town. Assuming all convenience expenditure generated by Zone 3 (Cinderford) can be retained and there is no change to expenditure flowing from other areas, then there will be capacity for 1,070sq m net by 2012. the demonstration of a sufficient level of capacity for the proposed new Tesco store will require expenditure to be drawn from other areas of the District. For comparison shopping in Cinderford, we have tested the possibility that the market share of Cinderford in Zone 3 could rise from the current level of 26% (including DIY store commitment) to 40% - assuming that a wider range of retail provision can be provided within the town centre in order to claw back existing leaked trips. This rise would provide a capacity of 1,150sq m by 2012, rising to 2,290sq m net by 2021.

Policy Document	Policy Objective / Strategy	'Constant market share' Approach		'Revised Market Share' Approach	
		Convenience	Comparison	Convenience	Comparison
PPS6	Qualitative Need	We have found that there is a qualitative need for additional convenience floorspace in Cinderford, on the basis of overtrading of existing stores and reasonably significant levels of leakage main/bulk-food shopping trips to facilities in other settlements. On the basis of the constant market share approach, maintaining the market share will do little to improve Cinderford's ability to retain greater levels of main/bulk-food expenditure.	The level of additional comparison identified in the constant market share approach is unlikely to provide a significant improvement to the range of comparison retail provision in Cinderford and therefore unlikely to meet current requirements to improve the range and quality of provision in the town.	There is clear qualitative support for an uplift in the market share of Cinderford and a new facility, or expanded existing facility, could retain more main/bulk-food shopping trips in the town centre. The recent Tesco proposal could have achieved this outcome.	There is a qualitative case for an increase in comparison floorspace in Cinderford, and our theoretical increase from 26% to 40% local retention from Zone 3 appears to be a sensible and realistic goal. Such an increase will allow the quality and range of comparison retail floorspace in Cinderford to be improved over the LDF period.
	Appropriate Scale of Development	The level of floorspace identified within this scenario will not conflict with issues relating to scale of retail provision within Cinderford.	The level of floorspace identified within this scenario will not conflict with issues relating to scale of retail provision within Cinderford.	We consider that the role and function of Cinderford is able to accommodate a larger main/bulk-food shopping destination. However, the proposed Tesco store would have provided the largest facility with the District and the LPA need to be satisfied that the scale of provision within Cinderford does not harm the scale of provision in other centres.	Over the LDF period, Cinderford is likely to be a key beneficiary of growth and regeneration investment. We consider that the scale of floorspace growth predicted within the revised market share scenario is commensurate with the role and function of Cinderford.
	Sequential Approach to Site Selection	This level of additional convenience retail floorspace should be directed to sites within Cinderford town centre in the first instance. Whilst not covered by this retail study, the rugby club site has already been accepted as an appropriate location for convenience retail provision by FODDC, although other locations covered by this report also offer smaller scale potential locations.	This modest increase in comparison floorspace will certainly be able to be accommodated within the sites identified within our site assessments	In line with the sequential approach to site selection, the objective should be to provide this additional space within the town centre. The rugby club site within Cinderford town centre has already been identified by FODDC as a suitable location for large scale convenience retail provision.	Whilst a detailed physical capacity analysis of the town centre sites identified in this report has not been undertaken, we consider that there is ample opportunity for Cinderford town centre (including the comparison goods floorspace associated with a new foodstore in the town) to accommodate this predicted level of growth.
	Potential Impact	This level of impact is unlikely to raise any impact issues for existing floorspace, assuming that it is accommodated within Cinderford town centre.	This level of impact is unlikely to raise any impact issues for existing floorspace, assuming that it is accommodated within Cinderford town centre.	The impact of a store the size of the recently proposed Tesco should be considered carefully; not only on other existing provision within Cinderford town centre, but also on existing provision within other town centres in the District and also on future public/private sector investment (including the ability to provide improved convenience retail facilities elsewhere in the District).	The level of additional comparison goods floorspace predicted in this scenario is considered to be significant and it is very important that every effort is made to place this provision within the town centre – otherwise the justification for the revised market share approach will be reduced.
	Ensure Locations are Accessible	In line with the sequential approach to site selection, provision of this additional floorspace should be directed to the town centre, which provides the best opportunity for accessibility by sections of the community. However, this level of provision is unlikely to claw back trade currently being lost to surrounding settlements.	The level of comparison floorspace growth within this scenario is unlikely to change the shopping habits of local residents and there will continue to be a significant outflow of expenditure – which conflicts with the accessibility guidance within PPS6.	In order for the new provision to be acceptable, it must be located on a town centre site. Out-of-centre provision is unlikely to be acceptable.	Provision of new comparison floorspace within Cinderford town centre, which attracts further local residents to the centre, will be fully in line with guidance on accessibility within PPS6.
Regional Planning Guidance for the South West (RPG10) and Draft RSS	(RPG10) Policy EC6: Town Centres & Retailing & (draft RSS) Policy TC1	Whilst this level of additional provision will not conflict with the objectives of regional policy, it is unlikely to ensure that a good distribution of convenience facilities is maintained.	In our opinion, this level of floorspace won't conflict with regional policies although neither will it support the aim of maintaining and enhancing the health of town centres.	There is support from regional policy for the revised market share approach for convenience retailing in Cinderford, although final acceptability will depend on issues of impact and need.	There is support from regional planning policy for an improvement in the range of retail facilities in Cinderford, subject to the tests of need, sequential approach and impact.
Gloucestershire Structure Plan	Policy TC2	Assuming additional floorspace is provided within the town centre, there will be compliance with TC2.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.	There is potential support from the Structure Plan for this scenario, subject to impact and sequential approach policy tests.

Cinderford

6.31 At present, Cinderford is able to retain almost all locally-generated top-up food shopping trips, but only two-thirds of main/bulk-food shopping trips. Leakage of main/bulk-food trips flows to Lydney and towns outside of the District. Existing stores in the town centre (e.g. Co-op and Lidl) do not appear to be able to retain high levels of expenditure, although these stores are considered to be trading well. As a result, existing levels of overtrading indicate a potential existing surplus capacity for additional convenience 650sq m net, which will rise to 925sq m net should the existing convenience market share of Cinderford remain constant over the LDF period. However, in light of existing levels of leakage of main/bulk-food shopping trips, overtrading at existing stores and the views of local residents, there is a qualitative case for improving provision, which has already been acknowledged by the District Council when considering previous proposals for a Tesco store on the site of the existing rugby club. It is understood that Tesco are currently re-working they proposal for a new store in Cinderford, and that a revised application for redevelopment of the rugby club site will be forthcoming.

6.32 Given the existence of the previous Tesco proposal, a useful starting point for our revised market share approach for convenience retailing in Cinderford is to model the trading impact of this store on local expenditure patterns. Using supporting information submitted with the previous Tesco planning application, the convenience goods turnover of this facility would be £29.5m and, on the basis of the pattern of trade diversion suggested by Tesco, would increase the convenience shopping market share of Cinderford from 8.6% to approximately 18-19%, providing a total study area derived turnover for convenience stores in Cinderford of approximately £44m. On this basis, there would be a potential surplus capacity for 2,450sq m net convenience goods floorspace by 2012, where a standard Tesco convenience sales benchmark is used. However, this is based on the applicant's assertion that only 20% of the Tesco's turnover being drawn from existing stores in Cinderford, which will require carefully examination (along with the wider tests of need and impact) by the local planning authority as and when a new application is submitted.

6.33 For example, given that the local area surrounding Cinderford (Zone 3) only generates around £18m of convenience expenditure and the applicant has previously suggested that the convenience turnover of the store will be in the region of £29m, it is clear that the Tesco will significantly increase the size of Cinderford's catchment area. At the very least (assuming at all of the expenditure generated by Cinderford flowed to the Tesco and none went to existing stores), some 40% of the new Tesco's turnover would need to be supported by non-Cinderford expenditure. This is likely given the results of the 2007 household survey which found the following potential usage rates from surrounding areas:

- 20% of Zone 1 residents (Lydney)

- 54% of Zone 2 residents (Coleford)
- 72% of Zone 4 residents (North of Cinderford)
- 22% of Zone 5 residents (areas surrounding and between Chepstow and Monmouth)
- 40% of Zone 6 residents (Ross-on-Wye)
- 24% of Zone 7 residents (areas to the west of Gloucester)
- 14% of Zone 8 residents (Newent)

6.34 Because of the above pattern of potential trade draw, there is a prospect that trade will be diverted from existing convenience facilities in other settlements. For example, it is likely that the diversion of trade to the new Tesco in Cinderford would result in a fall in the convenience market shares of both Lydney and Coleford, as leakage from Cinderford to Lydney would cease and Coleford residents transferring their trips from the Tesco in Lydney to the new store in Cinderford. In addition, significant levels of trade will be drawn from stores in Coleford. On this basis, we recommend that the Council seek detailed information from Tesco as part of any new application submission which not only examines the headline trade diversion figures but also provides a clear indication of the pattern of trade draw to the new store from across the district.

6.35 Nevertheless, we also acknowledge that there could be potentially positive benefits to the Tesco scheme, on the basis that it would divert trade which is currently leaking to stores in Gloucester, Ross-on-Wye and Monmouth.

6.36 Overall, there is clear potential and justification for a revised market share approach to convenience retailing in Cinderford. Assuming a 100% retention of all convenience shopping from Zone 3 (Cinderford) and there being no change in the level of inflow from within or outside of the study area, then there will be capacity[5] for an additional 1,070sq m net by 2012, rising to 1,260sq m net by 2021. <u>This approach is in line with our policy options for the other key towns (i.e. self containment), although there is potential for this capacity level to increase where convenience expenditure from other parts of the study area is utilised to support a new store. However, this assessment can only be undertaken as and when details of the proposed scheme are known.</u>

6.37 Turning to comparison retailing in Cinderford, the constant market share approach allows for limited additional capacity: 220sq m net by 2012 and 1,100sq m net by 2021. However, we have identified that there is a qualitative deficiency in comparison retailing in Cinderford and the levels of additional floorspace within the constant market share approach are unlikely to significantly improve the current situation. Moreover, these levels will not support the regeneration schemes in Cinderford town centre which are currently being promoted by FODDC; some of which are covered

[5] Using a Tesco average convenience benchmark sales density level

by our site assessment analysis. Therefore we have a tested a scenario the comparison market share of Cinderford is increased. Cinderford currently retains only 22% of local comparison expenditure although this will increase to 26% assuming that one third of the turnover of the committed DIY store on Steam Mills Road derives from the local area. Therefore, as a revised market share option, which fulfils the need to improve qualitative aspects of provision, we have tested increasing Cinderford's comparison market share to a 40% local retention rate. This scenario predicts a quantitative need of 1,150sq m net by 2012, rising to 2,290sq m net by 2021. We consider that this revised market share approach is an appropriate strategy for FODDC to pursue for Cinderford, albeit on the clear assumption that the additional floorspace in provided within the town centre and/or as an extension to the town centre boundary.

6.38 Turning to locational matters for new retail provision, our foregoing analysis has acknowledged that the rugby club site is the most appropriate for large scale retail provision, in addition to smaller sites elsewhere in the town centre which are likely to be more suitable for smaller scale retail uses. However, in order for the rugby club site to function as a true extension to the core shopping area there will need to be a reasonable prospect of pedestrian linkages between the store and centre. As a starting point for this analysis, we have examined the level of linked trips currently undertaken between the Co-op store in Cinderford and the town centre, plus linkages between the Tesco store in Lydney and that town centre.

6.39 Of those respondents that use the Tesco store in Lydney for main food shopping 48% always/normally/sometimes carry out linked trips with other shops/services and 60% of these linked trips are with other facilities in Lydney town centre. Therefore, around 30% of shoppers who undertake their main food shopping at the Tesco in Lydney also visit the town centre for other purposes.

6.40 Turning to the Co-op in Cinderford, 66% of main food shoppers carry out linked trips to other shops/services and three quarters of these linked trips are with other shops and services in Cinderford town centre. Therefore, half of all main food shoppers at the Co-op also use other facilities in Cinderford town centre.

6.41 Having regard to the above figures, we consider that there is <u>potential</u> for the proposed foodstore at the rugby club site in Cinderford to benefit the nearby town centre in terms of linked trips. However, the extent of these trips will be dependant on the pedestrian routes which are put in place between the foodstore site and the primary shopping area. In addition, an analysis will need to be undertaken which compares the benefit that the Tesco could bring in terms of linked trips against the level of food and non-food expenditure which will be diverted from the centre to the new store.

6.42 Aside from the characteristics of the rugby club site, we support the District Council's efforts in terms of sites included within the Cinderford Business Plan, such as properties along High Street/Heywood Road, Dockham Road and Market Street.

6.43 Both of the above scenarios provide the opportunity for significant growth in the convenience and comparison retail sectors in Cinderford. It will therefore be important for this additional space to be provided within the town centre or, failing that, in edge of centre locations. This strategy should be supported by continued work on the environmental improvements for the town centre, which will assist in attracting new retailers into the town centre.

The Future of Retailing in Coleford – Consideration of Alternative Options

This analysis considers the alternative options for retail development strategy in Coleford. Two alternative strategies are considered. The first is a 'constant market share' approach, which bases the retail strategy, and the need to make further land use allocations, on the continuation of existing market penetration rates. The basis for the 'constant market share' approach is contained in the quantitative analysis in Section 5. The second approach examines the potential and/or desirability of a 'revised market share' approach in Coleford. It seeks to explore the implications of an amended market penetration rate, influenced by both internal and external factors to Coleford and the Forest of Dean District, for retailing in Coleford. The potential floorspace capacity implications of each approach are set out below.

	'Constant market share' Approach	'Revised Market Share' Approach
Floorspace Capacity Requirements for the Two Options:	In terms of convenience goods capacity, the constant market share approach indicates that there is a very limited quantitative need for additional convenience goods floorspace in Coleford up to 2021: 370sq m net. For comparison goods retailing, maintaining a constant market share will provide a quantitative need for additional 173sq m net by 2012, 326sq m net by 2016 and 652sq m net by 2021.	We have explored the possibility and desirability of pursuing a revised convenience retail market in order increase convenience shopping retention from Zone 2 residents from 50% to 90% in the future. This increase would generate sufficient surplus expenditure to support an additional 1,020sq m net by 2012, rising to 1,220sq m net by 2021. However, the ability to pursue an increased market share for Coleford could be compromised by the proposed Tesco store in Coleford and further analysis will be required. Beyond the levels of comparison goods floorspace capacity outlined in the constant market share approach, we have explored the desirability and policy compliance of a scenario where a strategy to increase the comparison retail market share of Coleford is pursued. We have tested a theoretical scenario where the town's market share in Zone 2 (its 'home zone') rises from the current level of 13% to 20% over the LDF period via claw back of expenditure from non-Forest of Dean destinations. This increase in market share could provide an indicative capacity of 721sq m net by 2012 and 1,336sq m net by 2021.

Policy Document	Policy Objective / Strategy	'Constant market share' Approach		'Revised Market Share' Approach	
		Convenience	Comparison	Convenience	Comparison
PPS6	Qualitative Need	We have found that there is a qualitative need to improve additional convenience floorspace provision in Coleford. However, maintaining a constant market share is unlikely to change the current situation.	The level of additional comparison identified in the constant market share approach is unlikely to provide a significant improvement to the range of comparison retail provision in Coleford in the longer term and therefore is unlikely meet current qualitative deficiencies.	There is a strong qualitative justification for an uplift in the market share of convenience retailing in Coleford. Currently a significant proportion of local shoppers chose to travel to Lydney and further afield for main food shopping. This scenario will meet qualitative indicators of need.	There is a qualitative case for an increase in comparison floorspace in Coleford and the increase in market share modelled suggests that further provision can be provided which increases the range and choice of the comparison retail offer.
	Appropriate Scale of Development	This level of provision will not conflict with issues relating to scale.	In our view, the level of additional floorspace provided for in the constant market approach to comparison retail provision will not conflict with the appropriate scale of development for Coleford. This is small scale in contrast to the existing levels of comparison floorspace in the town.	The provision of additional convenience floorspace within this scenario is unlikely to conflict with the test of scale.	Assuming that this additional provision can be provided within a town centre location, we consider that the revised market share approach is within acceptable levels in terms of scale, role and function of Coleford.
	Sequential Approach to Site Selection	This level of additional floorspace will be able to be provided within the town centre sites identified within this analysis.	By 2021, only a modest increase in comparison floorspace will be provided for. Whilst a detailed assessment of the physical capacity of individual opportunity sites has not been undertaken, we consider there is every opportunity for town centre sites in Coleford to accommodate the all of the identified need.	In line with the sequential approach to site selection, further additional space should be provided for on one of the town centre development opportunity sites identified within this analysis, or as an extension to an existing convenience store in the town.	We consider that there is a good opportunity for the level of additional floorspace outlined within this scenario to be accommodated on the town centre sites assessed within the preceding analysis. However, if substantial parts of this increase in provision are required to be located on edge or out-of-centre sites then this reduces the justification for the revised market share approach.
	Potential Impact	The lack of any additional floorspace will not raise any impact issues for existing floorspace.	This (small) level of additional provision is unlikely to have either a significant positive or negative effect on the health and attractiveness of Coleford town centre.	Assuming that this additional provision can be provided within the town centre, this scenario has the potential to provide a positive impact on the health of Coleford. Negative impact issues will be heightened if the new provision is in edge or out-of-centre locations. In addition, serious consideration should be given to the impact that a new supermarket in Cinderford could have on the ability to deliver additional convenience goods floorspace in Coleford.	The level of additional comparison goods floorspace outlined in this scenario will provide a significant increase to existing levels of provision, which are currently trading at moderate levels. In order for this scenario to be acceptable in terms of the 'impact' test, any new provision must be provided within the town centre and must demonstrate an improvement to the overall health and financial performance of the town centre.
	Ensure Locations are Accessible	This level of floorspace will not affect current levels of accessibility or patterns of convenience shopping in and around Coleford.	This level of provision is unlikely to affect comparison shopping patterns in and around Coleford and will not change accessibility levels – which can be improved to stem some of the significant levels of leakage out of the local area.	The revised market share scenario has the potential to retain more convenience shopping trips in Coleford and thus meet guidance in relation to accessibility.	Accessibility to a wider range of comparison goods facilities in Coleford has the clear potential to improve indicators of accessibility, thus reinforcing the justification for revised market share approach to comparison retailing in the town.
Regional Planning Guidance for the South West (RPG10) and Draft RSS	(RPG10) Policy EC6: Town Centres & Retailing & (draft RSS) Policy TC1	Lack of additional provision will not conflict with the objectives of regional policy, although this level of provision is unlikely to meet the aim of maintaining and enhancing provision over the LDF period.	Whilst no conflict with regional policy will result from this scenario, it is also unlikely to meet the need to maintain and enhance the health of town centres.	The improvement of convenience shopping provision in Coleford is likely to be supported by regional policies, assuming a town centre location is promoted.	Regional planning policy is likely to be supportive of improvements in the range of comparison retail facilities in Coleford, assuming they are provided within a town centre location.
Gloucestershire Structure Plan	Policy TC2	The lack of need for additional space will not conflict with the objectives of retail and town centre policy in the Structure Plan.	No conflict with Structure Plan policies.	Provision of additional convenience floorspace within Coleford town centre will be supported by Structure Plan policies.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.

Coleford

6.39 At present, Coleford has a restricted range of convenience facilities, most of which are orientated towards top-up shopping trips, and it is only the Co-op which attracts main food shopping trips, albeit only 22% of locally generated trips within this sector. Overall, stores in Coleford retain 43% of main/bulk-food shopping trips and 76% of top-up food shopping trips. Convenience shopping trips generally leak to Lydney (31% of main food trips), Cinderford (4% of main food trips) and outside of the District (21% of main food trips).

6.40 On this basis, it would be reasonable for Coleford to increase its market share in an attempt to claw back some locally generated convenience shopping trips. This change in current shopping patterns would benefit the town centre and result in more sustainable travel patterns and reduce journey lengths for Coleford residents. At present, Coleford is able to retain around 50% of all convenience goods expenditure generated by Zone 2 residents. Should this retention level increase to 90%, via clawback from Lydney and (to a lesser extent) other destinations, then there would be a surplus capacity of 1,020sq m net by 2012, rising to 1,220sq m net by 2021.

6.41 However, it should also be noted that Coleford's convenience market share could also fall if a new Tesco store is provided in Cinderford. Data submitted in support of the previous proposals for this store indicates that trade will be drawn from Coleford stores and, as a result, it may be unrealistic to attempt to achieve a 90% retention rate within Zone 2 (to provide 1,000sq m net of additional floorspace in Coleford) when much larger Tesco stores would be available for local residents in Cinderford and Lydney. Therefore, FODDC should be aware of the potential knock-on impact of a new Tesco store in Cinderford on retailing within Coleford and this should be considered carefully when determining future planning applications.

6.42 Turning to the comparison sector, retaining a contact market share would result in a limited quantitative need for additional floorspace, which would be unlikely to significantly improve qualitative aspects of provision. Therefore, there is a clear justification for an increase in the market share of comparison retailing in Coleford. At present, Coleford has a 13% market share in its local area (Zone 2) and we have tested an increase to 20% over the LDF period. This would present a quantitative need for 721sqm net by 2012, 916sq m net by 2016 and 1,336sq m net by 2021.

6.43 As a result, we have a provided a range of both convenience and comparison floorspace capacity figures for Coleford based on the constant market share and revised market share scenarios, with a revised market share scenario only to be pursued where sufficient town centre sites become available.

The Future of Retailing in Newent – Consideration of Alternative Options

This analysis considers the alternative options for retail development strategy in Newent. Two alternative strategies are considered. The first is a 'constant market share' approach, which bases the retail strategy, and the need to make further land use allocations, on the continuation of existing market penetration rates. The basis for the 'constant market share' approach is contained in the quantitative analysis in Section 5. The second approach examines the potential and/or desirability of a 'revised market share' approach in Newent. It seeks to explore the implications of an amended market penetration rate, influenced by both internal and external factors to Newent and the Forest of Dean District, for retailing in Newent. The potential floorspace capacity implications of each approach are set out below.

	'Constant market share' Approach	'Revised Market Share' Approach
Floorspace Capacity Requirements for the Two Options:	In terms of convenience goods capacity, the constant market share approach indicates that there is a very limited quantitative need for additional convenience goods floorspace in Newent: up to 480sq m net by 2012 and 610sq m net by 2021. For comparison goods retailing, maintaining a constant market share will provide a quantitative need for additional 190sq m net by 2012 and 610sq m net by 2021.	At present, whilst three quarters of top-up food shopping trips remain within Newent from Zone 8, only 30% of main/bulk-food shopping trips and 44% of overall convenience expenditure are retained. As a result, we have explored the possibility that, as a maximum (due to its role and size) up to 70% of all convenience shopping trips from the local area are retained. This would generate sufficient surplus expenditure to support an additional 1,170sq m net by 2012 and 1,360sq m net by 2021. There is also an opportunity to increase the level of comparison shopping trips which are retained in the local area. Given the role and size of Newent, increases in retention rates are likely to be limited and we have explored a modest uplift in retained shopping trips from the currently level of 10% to 15%. This would provide an indicative floorspace capacity of 690sq m net by 2012 and 1,220sq m net by 2021.

Policy Document	Policy Objective / Strategy	'Constant market share' Approach		'Revised Market Share' Approach	
		Convenience	**Comparison**	**Convenience**	**Comparison**
PPS6	Qualitative Need	We have found that there is scope for an improvement in the qualitative offer of convenience retailing in Newent, whose largest store is only some 620sq m net. Maintaining the current local market share is likely to result in some improvements in the convenience retail offer, although they may not be sufficient to alter existing shopping patterns.	The level of additional comparison identified in the constant market share approach is unlikely to provide a significant improvement to the range of comparison retail provision in Newent and meet any qualitative deficiencies.	There is qualitative support for the level of uplift identified within this scenario. It has he potential to retain more main food shopping trips in the local area.	There is a qualitative case for an increase in comparison floorspace in Newent and this level of provision has the potential to significantly improve the qualitative offer of the town centre. there is therefore qualitative support for this revised market share approach.
	Appropriate Scale of Development	The level of additional convenience retail floorspace outlined within this scenario is commensurate with the role and function of Newent in the sub-regional hierarchy.	In our view, the level of additional floorspace provided for in the constant market approach to comparison retail provision will not conflict with the appropriate scale of development for Newent.	This level of convenience floorspace increase is commensurate with the role and function of Newent, albeit at the higher end of the scale.	This level increase is considered to be significant and can only be justified in terms of scale if it is provided within the town centre.
	Sequential Approach to Site Selection	The additional floorspace identified in this scenario should be directed in the first instance to town centre locations, including the potential expansion of existing facilities. It is likely that the locations identified in this analysis could accommodate the level of additional floorspace within this scenario.	The additional floorspace identified in this scenario should be directed in the first instance to town centre locations. It is likely that the locations identified in this analysis could accommodate the level of additional floorspace within this scenario.	In line with the sequential approach to site selection, it will be important that this level of additional floorspace is provided within Newent town centre. The sites analysed within this report are unlikely to be able to accommodate this scale of floorspace and therefore the revised market share approach should only be adopted where there is certainty that a town centre location exists to accommodate this provision.	We have identified a number of locations within our analysis of potential development sites for the provision of additional comparison goods floorspace. It is unclear at this stage whether the level of increase outlined in this scenario can be accommodated on the sites identified and we would recommend that the level of increase in the comparison market share of Newent is tied to the physical capacity of available and suitable town centre (re)development sites.
	Potential Impact	Existing convenience retail facilities in Newent appear to be trading well and the level of additional floorspace identified in this scenario is unlikely to have a detrimental impact, assuming it is provided within town centre locations. However, it is unclear whether this level of floorspace could have a positive impact on Newent via claw back of shopping trips lost to surrounding settlements.	This level of floorspace increase is considered to be minor and will not have either a significant negative or positive impact on the town centre.	This is a significant increase in the level of convenience floorspace within Newent and it will be important that it is provided within the town centre in order to boost its attractiveness. Provision of this level of floorspace outside of the town centre could have a detrimental impact on existing facilities within the centre and should be considered very carefully.	If this level of provision is not provided successfully within Newent town centre, then significant levels of negative impact could occur. Therefore, this level of floorspace must be provided within the town centre otherwise 'impact' indicators suggest that this scenario should not be pursued.
	Ensure Locations are Accessible	This level of floorspace can expand provision and may have a minor positive impact on the accessibility of convenience shopping facilities to Newent residents.	This level of comparison retail floorspace is unlikely to alter comparison shopping patterns or accessibility indicators in the local area.	This level of increase in convenience shopping provision in Newent has the potential to retain a higher level of main/bulk-food shopping trips and, as a result, improve the accessibility of shopping facilities to Newent residents.	A further increase in comparison floorspace in Newent has the potential to improve accessibility by retaining more trips in the local area and giving the local population more opportunity to shop locally. However, a town centre location for this additional provision is the only sensible way of improving accessibility indicators.
Regional Planning Guidance for the South West (RPG10) and Draft RSS	(RPG10) Policy EC6: Town Centres & Retailing & (draft RSS) Policy TC1	This level of floorspace, assuming that it is placed in a town centre location, is likely to meet regional planning policy objectives.	This level of floorspace is unlikely to conflict with regional planning policy guidance.	Assuming that this level of provision is provided within Newent town centre, then there could be support from regional planning policies.	Assuming that this level of provision is provided within Newent town centre, then there could be support from regional planning policies.
Gloucestershire Structure Plan	Policy TC2	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.	This level of additional floorspace is unlikely to conflict with Structure Plan policies and has the potential to be accommodated in the town centre.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.	Compliance with Policy TC2 of the Structure Plan will be based on compliance with sequential approach, accessibility and impact issues.

Newent

6.44 At present, Newent has a limited range of both convenience and comparison facilities and the centre functions largely as a localised rural service centre. For both convenience and comparison shopping, the Newent area town centre experiences a significant leakage of trips to centres outside the District.

6.45 Due to the role and function of Newent, plus the size of the centre and catchment population, its scope to expand will be limited and we consider it is never likely to compete on a significant scale with the comparison retail offer available to shoppers in Gloucester. However, there are a number of opportunities to improve retail provision within Newent town centre and the retail policy options are discussed below.

6.46 At present, Newent attracts only 30% of main food and 77% of top-up shopping trips from the local area (Zone 8), with 67% main food shopping trips leaking to store outside of the District. This is a high level of leakage and there are opportunities for the Council to consider a strategy for combating this current loss of local expenditure. Therefore, we have tested an increase in the convenience market share of Newent within Zone 8 to 70% which represents, in our opinion, a realistic aspiration for convenience shopping retention in Newent. This would provide a surplus capacity of 1,170sq m net by 2012, and 1,360sq m net by 2021. This increase would assist the town in retaining more locally generated main food shopping trips, although all proposals for new convenience retail provision will need to meet the test of ‘impact’ on existing town centre facilities.

6.47 In relation to comparison retailing, Newent is only able to retain 10% of locally generated expenditure within Zone 8, which is the lowest retention rate of the four main Forest of Dean towns, although unsurprising given the role and location of the town. Continuation of this market share would provide for a very low indicative floorspace capacity of 190sq m net by 2012, rising to approximately 610sq m net by 2021. Our potential development site analysis has identified a number of retail development locations within the town centre which have the potential to accommodate higher levels of retail floorspace than identified in the constant market share scenario. When considering a realistic revised market share for Newent, we have had regard to the intended current and future role of the town, including the likely level of housing growth. As a result, we have modelled a 50% increase in the current market share in Zone 8 from 10% to 15%, which would provide a future capacity of 690sq m net by 2012, rising to 1,220sq m net by 2021. this increase is likely to be at the top end of the future potential for Newent, although should be supported by the District Council where town centre sites come forward to accommodate this level of floorspace.

Summary

6.48 In light of the foregoing analysis, we summarise below the levels of quantitative need for additional floorspace in each settlement, as predicted by the policy options analysis. Both residual expenditure and floorspace equivalents are provided, for the reasons outlined in the previous chapter regarding variable sales density levels.

Table Q: Recommended Levels of Convenience Floorspace Capacity in the Forest of Dean, 2007-2021

Town	Quantitative Need		
	2012	2016	2021
Lydney	0-294sq m (£3.0m)	0-440sq m net (£4.6m)	0-624sq m net (£6.8m)
Cinderford	647-1,071sq m net (£7.7m - £13.6m)	823-1,156sq m net (£8.7m - £15.0m)	925-1,259sq m net (£10.1m - £16.8m)
Coleford	247-1,020sq m net (£2.5m - £10.5m)	302-1,106sq m net (£3.2m - £11.7m)	370-1,220sq m net (£4.0m - £13.3m)
Newent	481-1,172sq m net (£5m - £12.1m)	539-1,257sq m net (£5.7m - £13.3m)	610-1,361sq m net (£6.6m - £14.8m)

Notes:
The above floorspace capacity figures outlined above can only be indicative, as the sales densities used may vary from the specific trading characteristics of individual proposals which may be submitted to FODDC. Therefore, we urge the local planning authority to also have regard to the surplus retail expenditure figures contained within the statistical analysis of capacity contained within appendices to this report.

The upper end of the floorspace capacity projections are based on Tesco benchmark convenience sales density information and these projections should be reconsidered as and when planning applications are submitted. For example, there may be an opportunity for an enhanced level of capacity but this will depend on the characteristics of the individual proposal and the acceptability of an enhanced catchment area for Cinderford.

Table R: Recommended Levels of Comparison Floorspace Capacity in the Forest of Dean, 2007-2021

Town	Quantitative Need		
	2012	2016	2021
Lydney	232-1,354sq m net (£1.3m - £7.5m)	488-1,696sq m net (£3.0m - £10.3m)	1,044-2,444sq m net (£7.1m - £16.6m)
Cinderford	220-1,164sq m net (£1.2m - £6.5m)	499-1,516sq m net (£3.0m - £9.2m)	1,107-2,286sq m net (£7.5m - £15.5m)
Coleford	173-721sq m net (£1.0m - £4.0m)	326-916sq m net (£2.0m - £5.6m)	652-1,336sq m net (£4.4m - £9.1m)
Newent	186-686sq m net (£1.0m - £3.8m)	318-841sq m net (£1.9m - £5.1m)	609-1,226sq m net (£4.1m - £8.3m)

Notes:
The above floorspace capacity figures outlined above can only be indicative, as the sales densities used may vary from the specific trading characteristics of individual proposals which may be submitted to FODDC. Therefore, we urge the local planning authority to also have regard to the surplus retail expenditure figures contained within the statistical analysis of capacity contained within appendices to this report.

(N.B. confirmation of these convenience and comparison floorspace capacity levels are subject to impact assessments which will be submitted with individual planning applications)

Out-of-Centre Retailing

6.49 Future proposals for out-of-centre retail development should be carefully considered and prevented if it is shown that they could soak up significant amounts of identified capacity and/or harm opportunities for town centre redevelopment/expansion. We do not consider there is currently a need for future out-of-centre retail allocations in the Forest of Dean, particularly given the opportunities presented by a range of potential (re)development sites within the main town centres. Nevertheless, the Council (along with potential applicants) will need to apply flexibility and realism when assessing the locational characteristics of retail warehouse proposals, particularly in the more historic centres. Should, through future planning applications, there be a proven need for certain types of retail warehouse floorspace (which can't be provided for in the town centre) then the Council will need to consider the most appropriate location for this provision. It appears logical and sustainable that the starting point for such an assessment will be to consider locating new uses immediately adjacent to existing large-scale retail provision and to seek improvements to public transport accessibility.

6.50 At present, largely due to the geography of the Forest of Dean and the way in which the principal settlements have grown, there is only very sporadic and limited out-of-centre retail development. Some of the national retailers that operate from retail warehouse/retail park are not represented in the District and therefore, residents travel outside the District for these goods. It is unlikely that appropriate sites will ever come forward for such retail development in all of the towns and therefore a certain proportion of this comparison expenditure will always be loss to destinations outside the district.

6.51 Furthermore, our analysis of known retail operator requirements indicates that there is little demand from the traditional retail warehouse sector for large format out of centre provision in the Forest of Dean. Therefore, we do not consider there is a need for a differentiated approach to bulky goods retailing in the Forest of Dean. Any proposals which do come forward for the sale of bulky comparison goods from large format units in the Forest of Dean can be adequately assessed under the standard retail policies in FODDC's Development Plan Documents (DPDs), as an appropriate location for these uses can be found by operating the standard sequential approach to site selection. On this issue, it will be important to ensure that the sequential approach set out in the DPDs takes full account of the flexibility required by PPS6.

6.52 In terms of FODDC's consideration of future retail proposals outside of existing town centres, PPS6 provides very clear guidance on the assessment of proposed schemes and builds upon superseded guidance in PPG6. As a result, a criteria-based policy will remain appropriate for considering new development that comes forward over LDF period. PPS6 advises that applicants for retail development should be required to demonstrate:

- The need for the development;
- That the development is of an appropriate scale;
- That there are no more central sites for the development;
- That there are no unacceptable impacts on existing centres; and
- That locations are accessible.

6.53 The above criteria will need to be incorporated into an updated version of Policy (R)FS.2 of the Local Plan, which deals with retail development outside of defined town centre. The key elements to an updated version of (R)FS.2 will comprise:

- **Need**. Policy (R)FS.2 already notes that retail applications located outside of the established town centre shopping areas in the Forest of Dean are required to demonstrate a need. This accords with national policy although PPS6 advises that retail uses proposed within a town centre boundary but outside of the primary shopping area will also be subject to the test of need. The supporting text to revised Policies (R)FS.2 and (R)FS.1 should take account of this important distinction. In addition, we consider that it would be very useful for an updated version of (R)FS.2 to make reference to the quantitative and qualitative aspects of 'need'.
- **Scale**. The issue of 'scale' should also be part any future retail policy. It is import that market towns, such as the principal towns in the Forest, which typically have small-scale and historic urban form, are not dominated by significant out-of-centre large scale retail warehouse type development. Therefore, we advise that an updated version of (R)FS.2, plus also town specific policies include reference to securing the appropriate scale of development within different types of centre in the Forest of Dean.
- **Sequential approach to site selection**. Clearly, like national guidance, the sequential test has long been an established part of retail policy in the Forest of Dean. This should continue in the forthcoming LDF and the supporting text to the updated version of Policy (R)FS.2 should also include reference to PPS6 guidance on the need for flexibility (within the parameters outlined by PPS6) when assessing all available options.

- **Impact.** Like the sequential test and assessment of need, the assessment of potential impact (including cumulative impact) is already enshrined in Polices (R)FS.1 & (R)FS.2 and should continue in the LDF. However, it is useful to highlight the list of assessment criteria (and accompanying floorspace threshold) given at paragraph 3.22 of PPS6 (which now includes specific reference for the need to assess impact on trade/turnover of existing centres) and the need for impact assessments to be undertaken for all proposals outside of defined primary retail frontages and sometimes (due to the scale of the scheme) for schemes inside.
- **Types of retail development subject to a revised version of Policy (R)FS.2 and other LDF core policies**. To avoid confusion, it will be useful for policies in the LDF to make it clear which types of retail development in the Forest of Dean will be subject to the suite of retail policies. As noted at paragraph 3.1 of PPS6, new development, redevelopment, extension to existing facilities, changes of use (involving development) and applications to vary or remove existing planning conditions, should be subject to the key retail policy tests.

6.54 In line with the project brief issued by the District Council, we have also considered the appropriateness of each town centre boundary and the defined primary retail frontages therein. In the case of the town centre boundaries, we consider that each of the four town centres possesses a boundary which is broadly reflective of the current distribution of retail, commercial and other town centre uses and also includes the potential development sites (covered in earlier in this section) which can add further retail and other town centre style uses to each centre. We examine the characteristics of individual centres in turn below.

6.55 In Lydney, no significant changes to either the town centre boundary or the primary retail frontages are required, although the land allocated under Policy (R)F.Lydney 5 for housing could potentially now be removed from the boundary and the primary retail frontages could extend further westwards up to the junction with Forest Road. In Cinderford, the town centre boundary already accommodates those sites which are being pursued through the Cinderford Business Plan and also the Cinderford Rugby Club site (recently proposed for a Tesco store). In terms of primary retail frontages in Cinderford, we consider that the existing designations are reflective of the retail-dominated areas, although depending on the progress made with the Cinderford Business Plan schemes, these frontages may extend southwards along High Street in the future.

6.56 In relation to Coleford and Newent, we do propose any amendments to either the town centre boundary or primary retail frontages, although retail-led development schemes may prompt reconsideration of the primary retail areas in the future.

7. SUMMARY AND CONCLUSIONS: A RETAIL STRATEGY FOR THE FOREST OF DEAN

Introduction

7.1 This report has been prepared by GVA Grimley in response to a brief by the Forest of Dean District Council (FODDC) to prepare a Retail Study for the Forest of Dean District. This study will provide essential background information and an evidence base to assist FODDC in the production of a Local Development Framework (LDF) for the Forest of Dean administrative area and will enable FODDC to prepare preferred options for its retail development strategy up to 2021. The key issues address in this study are:

- The need for additional retail space in the town centres.
- The adequacy of the existing space (in terms of size, type and quality of units).
- The physical quality of the centres (public spaces, parking, fabric generally).
- Pedestrian environment and linkages (access and attractiveness)
- Review of current allocated retail sites.
- Review of the appropriateness of the existing defined boundary of each of the town centres
- The allocation of some of the core/peripheral areas within the boundaries (appropriate uses and mix of uses).
- Out-of-centre retailing.

Context and Key Issues

7.2 In order to successfully address the key issues of the study, the Retail Study has been informed by a number of pieces of empirical research and a detailed analysis of town centre health and current retail expenditure patterns. Arising out of these assessments, we have been able to identify the retail context in the Forest of Dean and a set of key issues in each of the four principal settlements. In the pages which follow, we provide a résumé of the District's key retail and town centre characteristics, which have been used to inform the retail strategy for each settlement.

7.3 Our identification of the key issues has arisen as a result of the following assessments:

- Overview of the retail hierarchy in the Forest of Dean, focusing on a review of the vitality and viability of Lydney, Cinderford, Coleford and Newent.
- Assessment of the need for additional retail floorspace in the Forest of Dean over the period 2007-2021, focusing on an assessment of quantitative and qualitative factors for different types of retail goods. This work has drawn upon up-to-date population, per capita expenditure and shopping patterns data to provide an up-to-date assessment of the quantitative flows of expenditure to each of the four principal settlements.
- Following the initial quantitative assessment, we have reviewed potential shopping development opportunities in each of the four principal settlements. This work has examined existing allocations/opportunities identified in the adopted Local Plan, plus new potential opportunities which have been identified through the course of completing this study.

7.4 Following the assessment of town centre health, existing quantitative flows of retail expenditure, qualitative factors of need, plus potential development potential development opportunities, we have formulated a retail strategy for the four principal Forest of Dean settlements. In order to do this, we have undertaken a broad policy options analysis, which will help the Council to develop a front-loaded LDF and will encourage a meaningful response from the local community and key stakeholders on a genuine choice of options for retail uses. The options analysis will help the Council develop its Development Plan Documents for the Forest of Dean, plus agreeing an area-specific vision and defining key objectives. The options analysis itself has taken into account the suite of policy objectives provided at the national, strategic and local level and has assessed the potential differences between convenience and comparison shopping provision in each of the four principal settlements.

7.5 The outputs from the policy options analysis have informed the retail roles and strategy for each of the four principal centres. These roles are designed to be complementary to each other and will support the wider regenerative aims and aspirations promoted by FODDC. The remainder of this section describes a series of policy approaches and initiatives which are intended to reinforce and promote the distinctive roles of the four principal settlements in the Forest of Dean.

7.6 A common format is used to record the contents of the retail strategy for each centre. This comprises an overview of the health and retail characteristics of each centre, followed by an outline of the recommended retail strategy and a description of the actions required to achieve the goals set.

LYDNEY

Current Role and Health of Town Centre	▪ Lydney is the largest of four principal settlements in the District, which has been highlighted as a potential area of growth during the Local Plan and LDF periods. ▪ The town centre has a reasonable range of retail and service uses, including a small number of national multiple operators and a range of local/independent operators. There is also a low vacancy rate in the town centre (second lowest in the District). ▪ The town centre environment is considered to be reasonably good, although high levels of through-traffic can constrain pedestrian movement. ▪ The household survey indicates that Lydney has the largest shopping catchment of the four Forest towns, confirming its role in the local area.
Shopping Patterns and Financial Performance	▪ Lydney retains over three quarters of local main/bulk-food shopping trips and just under three quarters of top-up food shopping trips from the local area. The dominant convenience store within the town is the Tesco store, which has a large catchment area and draws trade from other towns in the District. ▪ Lydney attracts £34.7m of convenience goods expenditure, £25m of which flows to the Tesco store. ▪ The town retains only 21% of locally generated comparison goods expenditure, with shopping trips leaking to Bristol, Cheltenham and Gloucester. ▪ Town centre has a comparison goods turnover of £13.1m, equivalent to a sales density of £4,250/sq m.
Proposed Retail Strategy	▪ Given the existing level of convenience retail provision within Lydney, along with existing good convenience trip retention levels, we are recommending a constant market share for the future of convenience retailing. Depending on the development of retail facilities in other centres, there is potential for limited additional capacity of 600sq m net by 2021. ▪ In terms of comparison goods retailing, relatively low retention levels plus the need to provide a wide range of facilities to serve the existing and future local population suggests that a strategy which aims to increase the market share of Lydney (within sensible and realistic levels) is appropriate. This provides for a potential increase in comparison goods floorspace capacity of

	between 232-1,354sq m net by 2012, rising to 1,044-2,444sq m net by 2021. ▪ A number of potential town centre development sites in Lydney have been assessed in this study, although a site at the eastern end of the town centre (comprising the Paramount car sales garage plus retail units and surface level parking) offers a significant opportunity to provide new retail floorspace within the town centre and much better linkages to the adjacent bus station and Somerfield foodstore. The need for improvement in this area is augmented by the presence of a large vacant unit (former One Stop convenience store) which detracts from the entrance to the town centre.

CINDERFORD

Current Role and Health of Town Centre	▪ Cinderford is located in the central part of the District and possesses the second largest town centre in terms of retail and commercial unit numbers. However, Cinderford has been recognised as being in need of regeneration and the District Council and other public sector agencies are investing in the town to improve its attractiveness and economic performance. ▪ Cinderford possesses a reasonable proportion of convenience and service units within its town centre, although comparison uses are significantly below the national average and vacant rates are currently high (the highest in the District by some margin). ▪ The visual appearance of the centre is considered to be poor and a number of enhancement projects being pursued by the District Council aim to significantly improve this situation, including better pedestrian movement around the centre. ▪ It is also clear that Cinderford town centre suffers from a shortage of car parking and the existing parking capacity is poor quality. This situation is likely to be a negative factor for the overall health of the town centre.
Shopping Patterns and Financial Performance	▪ In terms of convenience shopping, Cinderford retains the majority of local top-up shopping trips as well 60% main of local main food shopping trips. The dominant store in the town centre is the Co-op store on Dockham Road which attracts most of the retained main food shopping trips. Overall, convenience stores in Cinderford are considered to be trading well. ▪ In contrast, there is significant leakage of local comparison expenditure; 78% of locally generated comparison goods expenditure leaks to stores/centres outside the District. ▪ Cinderford town centre has a total comparison turnover of £10.1m, which is equivalent to a sales density of £6,000/sq m and an indication of a good financial performance.
Proposed Retail Strategy	▪ Having regard to our analysis of town centre health and the qualitative aspects of existing retail provision, we have concluded that there is a clear justification for a revised market share approach to be pursued in Cinderford. In terms of convenience shopping, it is already been recognised by the District Council that a new large foodstore which can help to

	retain greater levels of main food shopping trips can be an important addition to the town centre retail offer. Where Cinderford can retain all of its locally generated expenditure, then we envisage a capacity for 1,070sq m net by 2012, rising to 1,270sq m net by 2021, although these capacity could increase when proposals can demonstrate that an enlarged catchment for Cinderford will not damage other towns. Nevertheless, future proposals for new foodstores in Cinderford should be carefully assessed by the District Council given their potential impact of the financial performance of surrounding settlements, particularly Coleford. ▪ Turning to comparison floorspace, we also consider that continuation of the current market share of Cinderford is not a realistic or sensible option and modest increases in the local market share of the town centre in Zone 3 could provide an additional comparison floorspace capacity of up to 1,164sq m net by 2012, rising to 2,286sq m net by 2021. ▪ These higher levels of retail floorspace capacity are pursued on the basis that the additional retail floorspace provision can be provided within the town centre boundary and the various enhancement schemes being promoted by the District Council through the Cinderford Business Plan are considered capable of accommodating this capacity. ▪ A key aspect of improving the performance of Cinderford will be to improve the attractiveness of the centre to visitors. Pedestrian movement and access to car parking provision needs to be improved, as does a reduction in the level of vacancies and the attraction of new retailers to the centre.

COLEFORD

Current Role and Health of Town Centre	▪ Coleford town centre is reasonably large and provides for a wide range of retail and service uses, which are primarily local/independent operators. Vacancy levels in the centre are low, indicating a good demand for premises. ▪ Convenience retail provision in the centre is dominated by Co-op, Somerfield and Tesco Express stores, which are orientated towards a top-up food shopping function, although the Co-op and Somerfield stores do retain around 40% of local main food shopping trips. ▪ The general physical environment within the town centre is considered to be reasonably good, with attractive shopping streets and areas of public realm. However, a significant part of retail and service provision within the town centre is located within Pyart Court, which is a modern development somewhat separated from the core retail area. This separation is considered to be a disadvantage for the centre and a future focus must be on improving linkages between these two locations.
Shopping Patterns and Financial Performance	▪ As already noted, the focus of convenience shopping in Coleford is on top-up shopping with a 77% trip retention rate. Retention of main food trips is much lower and leakage occurs to Lydney and (to a lesser extent) Cinderford, plus stores outside of the District. The best performing stores in the centre are the Co-op followed by the Somerfield stores. ▪ The town centre has a comparison goods turnover of £6.7m, which is much lower than Cinderford and Lydney and there is a much lower retention rate of locally-generated comparison shopping trips. The turnover of the centre is equivalent to a sales density of £2,750/sq m.
Proposed Retail Strategy	▪ Following an analysis of existing provision and shopping trip patterns, we are recommending that there is an opportunity to improve retention levels for both convenience and comparison shopping in Coleford. For convenience retailing, there is a clear potential for a better retention in main food shopping trips and our revised market share approach indicates an indicative

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	capacity for an additional 1,020sq m net by 2012. However, the ability to achieve this aim will in part be dependant on the scale of new provision within Cinderford and the effect that it has on shopping patterns in nearby Coleford. ▪ For comparison shopping, we are also proposing a realistic rise in the market share of Coleford which could, if new provision is provided within the town centre, allow for additional 720sq m net by 2012, rising to 1,300sq m net by 2021. ▪ We consider that the main location to accommodate this additional retail provision in Coleford town centre remains land at the Marshes which is allocated within the adopted Local Plan for retail development. Development of the Marshes offers the potential to improve vehicular access into the town centre and better pedestrian linkages between the core retail area and Pyart Court.

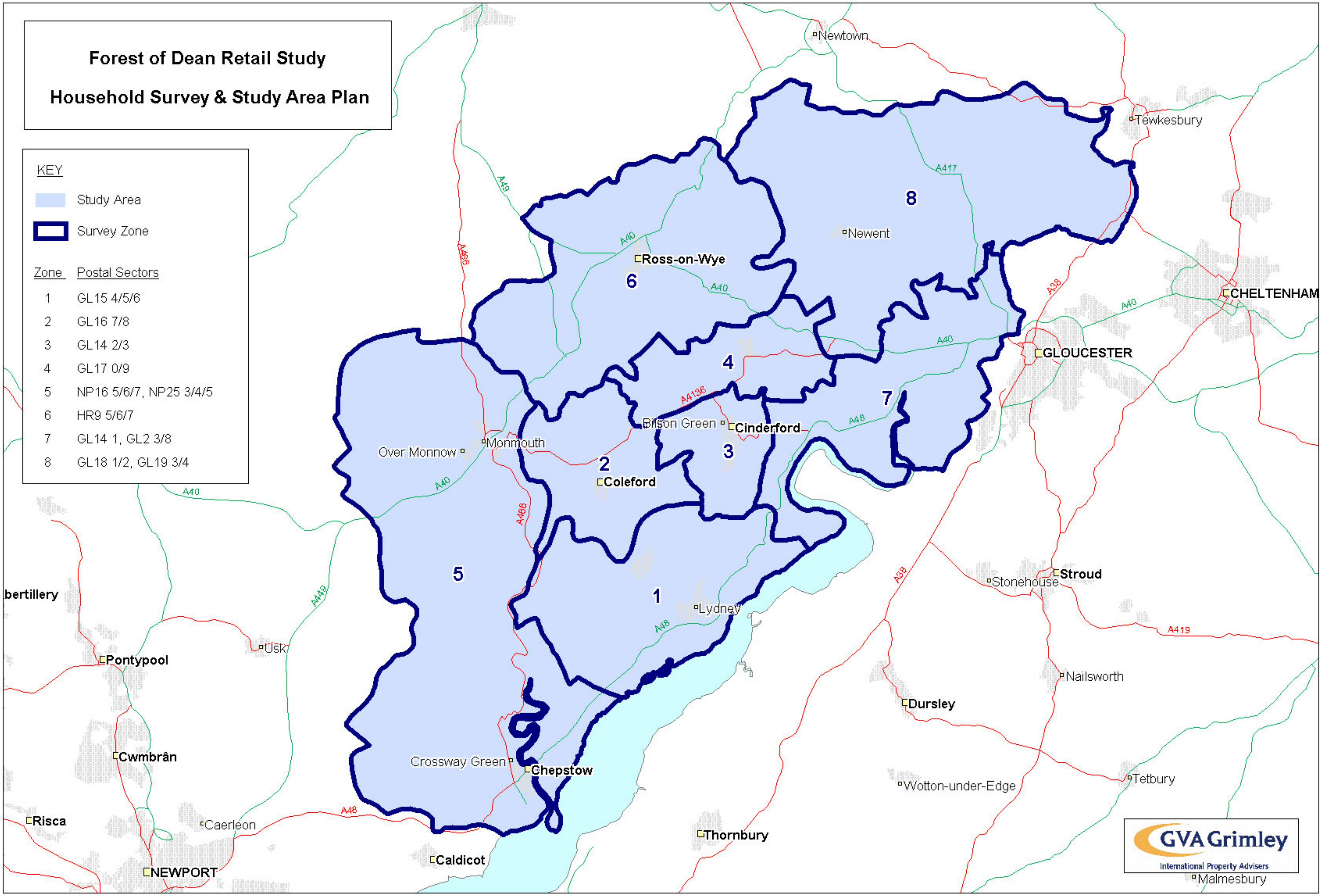
NEWENT

Current Role and Health of Town Centre	▪ Newent is the smallest of the four town centres in the District and serves a localised catchment in the northern part of the District. ▪ We consider Newent to be an attractive and healthy centre, which provides a good range of convenience and service uses, along with a low vacancy level. Only the level of comparison retail provision appears to be below average, which is likely to be product of the size and location of the centre and its proximity to Gloucester. ▪ Newent is an attractive centre with an historic street pattern and plenty of interesting and attractive buildings and spaces. However, parts of the centre have become derelict and a recent environmental enhancement study aims to improve these areas with new development and an enhanced public realm. ▪ Retail provision in the town centre is dominated by local/independent operators, although there is a Budgens convenience store which the dominant foodstore in the local area.
Shopping Patterns and Financial Performance	▪ Convenience shopping in Newent is primarily top-up shopping and the centre retains 77% of top-up shopping compared to only 30% of main food shopping. The best performing store is the Budgens store which appears to be trading very well and accommodating main and top-up food shopping trips. ▪ The town centre has the smallest study area derived turnover in the District of £5.4m, which is equivalent to a sales density of £4,500/sq m which is considered to be good for a town of this size and scale. ▪ Newent is only able to retain around 10% of locally-generated comparison goods expenditure, with the remainder flowing to store and centres outside of the District.
Proposed Retail Strategy	▪ Due to the low level of main food shopping trip retention in Newent, there is a clear opportunity to rectify this situation by providing a larger facility which better caters for these trips of shopping trip. By revising the convenience market share of convenience shopping in Newent upwards, there could be capacity for an additional 1,300sq m net by 2012, although this scenario should only be pursued if new provision can be

	provided within the town centre (which is at present uncertain) and where it not have a detrimental impact upon existing provision. ▪ Similarly, the existing market share of comparison shopping in Newent is low and a revised market share could provide a future capacity of up to 1,200sq m by 2021 (although this level will depend on the physical capacity of town centre sites to accommodate additional provision). ▪ The recent Newent environmental enhancement study has identified a number of locations for additional town centre development in Newent, some of which will include new retail floorspace. This study wishes to endorse the promotion of these sites as the best way of improving the attractiveness and financial performance of Newent town centre.

APPENDICES

Appendix A
Study Area Plan



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005). Postcode Boundary Data: © 2005 Royal Mail

Appendix B

Household Survey Tabulations

Q01 In which shop or shopping centre do you do most of your household's main food shopping ?
Those who don't use the internet to do their main food shop at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Tesco, Lydney	14.5%	109	58.3%	66	28.9%	20	10.5%	6	1.1%	1	4.1%	8	0.0%	0	8.2%	6	2.2%	2
Tesco, Chepstow	13.2%	99	9.4%	11	5.6%	4	0.0%	0	0.0%	0	44.9%	85	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ross-on-Wye	12.8%	97	2.1%	2	2.2%	2	12.6%	8	29.9%	16	2.0%	4	52.7%	55	1.0%	1	10.8%	9
Waitrose, Monmouth	6.7%	51	4.2%	5	4.4%	3	0.0%	0	4.6%	2	15.3%	29	11.0%	11	0.0%	0	0.0%	0
Tesco, St Oswalds Park, Gloucester	5.9%	44	0.0%	0	1.1%	1	2.1%	1	9.2%	5	0.0%	0	1.1%	1	40.8%	31	5.4%	5
Tesco, Gloucester Business Park, Gloucester	5.5%	42	0.0%	0	2.2%	2	5.3%	3	4.6%	2	0.0%	0	1.1%	1	20.4%	16	20.4%	18
Co-Op, Cinderford	5.1%	38	0.0%	0	0.0%	0	49.5%	30	10.3%	6	0.0%	0	0.0%	0	2.0%	2	1.1%	1
Somerfield, Monmouth	4.6%	34	0.0%	0	2.2%	2	0.0%	0	0.0%	0	17.3%	33	0.0%	0	0.0%	0	0.0%	0
Asda, Gloucester	3.1%	24	2.1%	2	2.2%	2	8.4%	5	8.0%	4	0.0%	0	2.2%	2	2.0%	2	7.5%	6
Somerfield, Ross-on-Wye	3.1%	23	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	20.9%	22	0.0%	0	0.0%	0
Somerfield, Chepstow	2.8%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	21	0.0%	0	0.0%	0	0.0%	0
Budgens, Newent	2.7%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	3.1%	2	19.4%	17
Co-Op, Coleford	2.3%	18	1.0%	1	22.2%	15	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Lydney	2.3%	17	12.5%	14	2.2%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Lidl, Cinderford	2.1%	16	1.0%	1	4.4%	3	8.4%	5	6.9%	4	1.0%	2	1.1%	1	0.0%	0	0.0%	0
Somerfield, Coleford	1.8%	13	0.0%	0	18.9%	13	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Newent	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	10.8%	9
Sainsbury's, Gloucester	1.3%	10	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0	1.1%	1	7.1%	5	1.1%	1
Tesco, Orchard Lane, Ledbury	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.0%	1	7.5%	6
Co-Op, Lydney	1.1%	8	7.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Quedgeley, Gloucester	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	5	0.0%	0
Waitrose, Cheltenham	0.6%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4
Tesco, Bewell Street, Hereford	0.6%	4	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0
Somerfield, New Street, Ledbury	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	3.2%	3
Asda, Llewllyn Road, Cwmbran	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Gloucester	0.4%	3	0.0%	0	0.0%	0	1.1%	1	1.1%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Morrisons, Ashchurch Road, Tewkesbury	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.2%	2
Lidl, Chepstow	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Highwood Lane, Avon	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-Op, High Street, Mitcheldean	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Bishops Road, Tewkesbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	1
Tesco Express, Coleford	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Ross-on-Wye	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Northumbria Drive, Bristol	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Chepstow	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Bristol Road, Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Local stores, Ledbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Morrisons, Cheltenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Local stores, Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Lidl, Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local stores, Newnham-on-Severn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local stores, Cinderford	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Coleford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Drybrook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Ruardean	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Cheltenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Mitcheldean	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		752		114		68		61		53		189		104		77		86
Sample:		748		96		90		95		87		98		91		98		93

Column %ges.

Q02 How do you normally travel to your main food shopping destination (STORE MENTIONED AT Q01) ?
Those who do a main food shop and who do not use the internet at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Car / van (as driver)	65.4%	514	67.0%	79	69.7%	52	61.2%	39	74.5%	43	55.9%	110	69.1%	75	70.7%	55	68.4%	62
Car / van (as passenger)	16.8%	132	22.0%	26	20.2%	15	13.3%	8	17.0%	10	18.6%	37	9.6%	10	20.2%	16	11.2%	10
Bus	3.3%	26	2.0%	2	2.0%	2	2.0%	1	3.2%	2	6.9%	14	2.1%	2	2.0%	2	2.0%	2
Motorcycle	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	11.2%	88	5.0%	6	8.1%	6	23.5%	15	4.3%	2	15.7%	31	16.0%	17	1.0%	1	11.2%	10
Taxi	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Train	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
Bicycle	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
Internet / mail order / delivered	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2
Other	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
(Don’t know / varies)	2.5%	20	3.0%	4	0.0%	0	0.0%	0	1.1%	1	2.9%	6	2.1%	2	4.0%	3	5.1%	5
Weighted base:		787		118		75		63		58		197		108		77		90
Sample:		784		100		99		98		94		102		94		99		98

Q03 How often do you do your main food shopping ?
Those who do a main food shop at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Everyday	2.8%	22	2.0%	2	3.0%	2	4.0%	3	2.0%	1	2.0%	4	4.0%	5	2.0%	2	4.0%	4
2 - 3 times a week	14.0%	112	12.9%	15	9.0%	7	8.1%	5	9.0%	6	25.5%	50	12.1%	14	11.0%	9	7.0%	6
Once a week	67.5%	541	75.2%	90	71.0%	54	73.7%	47	70.0%	43	63.7%	125	68.7%	78	65.0%	51	57.0%	53
Once a fortnight	7.9%	63	5.9%	7	7.0%	5	7.1%	5	12.0%	7	1.0%	2	8.1%	9	12.0%	9	20.0%	18
Once a month	5.6%	45	3.0%	4	8.0%	6	6.1%	4	5.0%	3	4.9%	10	6.1%	7	7.0%	5	7.0%	6
Less frequently	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no particular pattern)	2.0%	16	0.0%	0	2.0%	2	1.0%	1	1.0%	1	2.9%	6	1.0%	1	2.0%	2	5.0%	5
Weighted base:		801		120		76		64		61		197		114		78		92
Sample:		801		101		100		99		100		102		99		100		100

Q04 When your household undertakes its main food shopping (AT STORE / CENTRE MENTIONED AT Q01), does it also visit OTHER shops, leisure or service outlets on the same shopping trip ?
Those who do a main food shop and who do not use the internet at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Always	11.6%	91	8.0%	9	10.1%	8	16.3%	10	9.6%	6	13.7%	27	14.9%	16	5.1%	4	12.2%	11
Normally	11.1%	87	8.0%	9	11.1%	8	14.3%	9	17.0%	10	6.9%	14	18.1%	20	11.1%	9	10.2%	9
Sometimes	26.9%	211	38.0%	45	35.4%	26	34.7%	22	27.7%	16	22.5%	44	23.4%	25	26.3%	20	13.3%	12
Rarely	4.2%	33	5.0%	6	7.1%	5	9.2%	6	2.1%	1	2.9%	6	4.3%	5	0.0%	0	5.1%	5
Never	45.6%	358	41.0%	49	36.4%	27	24.5%	15	40.4%	23	53.9%	106	38.3%	41	56.6%	44	58.2%	53
(Don't know / varies)	0.7%	5	0.0%	0	0.0%	0	1.0%	1	3.2%	2	0.0%	0	1.1%	1	1.0%	1	1.0%	1
Weighted base:		787		118		75		63		58		197		108		77		90
Sample:		784		100		99		98		94		102		94		99		98

Q05 Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets ?
Those who do a main food shop and who do not use the internet at Q01 and who visit other shops or services at Q04

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local stores, Ross-On-Wye	9.3%	39	0.0%	0	0.0%	0	1.4%	1	13.2%	4	0.0%	0	50.9%	33	0.0%	0	2.5%	1
Local stores, Monmouth	7.9%	33	3.4%	2	1.6%	1	0.0%	0	3.8%	1	25.5%	23	8.8%	6	0.0%	0	0.0%	0
Local stores, Lydney	7.5%	32	30.5%	21	7.9%	4	2.7%	1	3.8%	1	0.0%	0	0.0%	0	9.5%	3	2.5%	1
Local stores, Chepstow	7.4%	31	5.1%	4	1.6%	1	0.0%	0	0.0%	0	29.8%	27	0.0%	0	0.0%	0	0.0%	0
Local stores, Cinderford	6.8%	29	1.7%	1	1.6%	1	37.0%	17	24.5%	8	0.0%	0	0.0%	0	4.8%	2	0.0%	0
Gloucester City Centre	5.8%	24	6.8%	5	4.8%	2	9.6%	5	18.9%	6	0.0%	0	0.0%	0	9.5%	3	10.0%	4
Local stores, Coleford	4.3%	18	1.7%	1	31.7%	15	1.4%	1	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Newent	4.2%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3	4.8%	2	35.0%	13
Local stores, Gloucester	3.4%	14	1.7%	1	0.0%	0	1.4%	1	1.9%	1	0.0%	0	1.8%	1	19.0%	6	12.5%	5
Cribbs Causeway Retail Park, Bristol	2.4%	10	3.4%	2	0.0%	0	0.0%	0	0.0%	0	8.5%	8	0.0%	0	0.0%	0	0.0%	0
Co-Op, Lydney	2.3%	10	11.9%	8	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Somerfield, Chepstow	1.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	8	0.0%	0	0.0%	0	0.0%	0
Hereford Town Centre	1.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	7	0.0%	0	0.0%	0
Local stores, Cheltenham	1.6%	7	0.0%	0	1.6%	1	0.0%	0	3.8%	1	0.0%	0	1.8%	1	2.4%	1	7.5%	3
Newport Town Centre	1.5%	6	3.4%	2	0.0%	0	0.0%	0	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0
Somerfield, Lydney	1.4%	6	8.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Ledbury	1.4%	6	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	2.4%	1	7.5%	3
Somerfield, Monmouth	1.1%	5	0.0%	0	1.6%	1	0.0%	0	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0
Lidl, Cinderford	1.0%	4	3.4%	2	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Lydney	0.9%	4	0.0%	0	1.6%	1	2.7%	1	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
B&Q, St Oswalds Park, Gloucester	0.9%	4	0.0%	0	0.0%	0	1.4%	1	1.9%	1	0.0%	0	1.8%	1	4.8%	2	0.0%	0
Morrisons, Ross-on-Wye	0.8%	3	0.0%	0	4.8%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
St Oswald Park, Gloucester	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	2	2.5%	1
Tesco, St Oswalds Park, Gloucester	0.8%	3	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	1.8%	1	2.4%	1	0.0%	0
Somerfield, Ross-on-Wye	0.7%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0
Co-Op, Coleford	0.5%	2	0.0%	0	4.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kwik Save, Chepstow	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Local stores, Cwmbran	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Cheltenham	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Chepstow	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Co-Op, Cinderford	0.4%	2	0.0%	0	0.0%	0	1.4%	1	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Cheltenham	0.4%	2	1.7%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmers Market, Gloucester City Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	2.5%	1
Local stores, Tewkesbury	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0
JJB Sports, St Oswalds Park, Gloucester	0.4%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Tesco Express, Coleford	0.4%	2	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Monmouth	0.4%	2	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Coleford	0.4%	2	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, North Gate Street, Gloucester	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Boots, Chepstow	0.3%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Gloucester Business Park, Gloucester	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Local stores, Hereford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Ledbury Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Tewkesbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Retail Park, Tewkesbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Boots, Dursley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Local stores, Quedgley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Local stores, Westbury-on-Severn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Morrisons, Gloucester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Local stores, Minsterworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Local stores, Hartpury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Bristol	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Monmouth	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Boots, Ross-On-Wye	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Gloucester	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Gloucester	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Littledean	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Ruardean	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Drybrook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Mitcheldean	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(Don't know / varies)	12.6%	53	13.6%	9	22.2%	11	26.0%	12	11.3%	4	8.5%	8	7.0%	5	7.1%	2	7.5%	3
Weighted base:		423		70		48		47		33		91		65		33		37
Sample:		434		59		63		73		53		47		57		42		40

Q06 Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you spend at (STORE MENTIONED AT Q01) ?
Those who do a main food shop at Q01 and who know how much they spent at Q06

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
0 - 10%	1.8%	11	1.4%	1	5.3%	3	0.0%	0	2.2%	1	1.3%	2	1.2%	1	1.2%	1	2.6%	2
11 - 20%	1.6%	10	4.3%	4	1.3%	1	1.4%	1	2.2%	1	1.3%	2	0.0%	0	0.0%	0	2.6%	2
21 - 30%	3.9%	24	10.0%	8	2.6%	2	0.0%	0	4.5%	2	2.5%	4	2.4%	2	4.7%	3	3.9%	3
31 - 40%	3.7%	23	0.0%	0	11.8%	7	4.1%	2	4.5%	2	2.5%	4	4.9%	5	2.4%	2	2.6%	2
41 - 50%	14.2%	89	11.4%	9	9.2%	5	14.9%	7	18.0%	10	12.7%	19	14.6%	14	18.8%	13	16.9%	12
51 - 60%	8.4%	53	7.1%	6	13.2%	8	10.8%	5	11.2%	6	5.1%	8	8.5%	8	5.9%	4	11.7%	8
61 - 70%	11.3%	71	8.6%	7	6.6%	4	8.1%	4	11.2%	6	11.4%	17	12.2%	11	18.8%	13	11.7%	8
71 - 80%	29.7%	186	25.7%	21	28.9%	17	32.4%	15	28.1%	15	31.6%	48	35.4%	33	29.4%	20	23.4%	17
81 - 90%	13.1%	82	12.9%	11	7.9%	5	12.2%	6	7.9%	4	17.7%	27	9.8%	9	14.1%	9	15.6%	11
91 - 100%	12.3%	77	18.6%	15	13.2%	8	16.2%	8	10.1%	6	13.9%	21	11.0%	10	4.7%	3	9.1%	6
Weighted base:		627		83		57		48		55		152		94		67		71
Sample:		632		70		76		74		89		79		82		85		77

Q07 Where do you do most of your household's shopping for small scale 'top-up' food shopping ?
Those who do not use the internet to do their top-up shopping at Q07

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Co-Op, Cinderford	7.9%	49	4.0%	4	0.0%	0	67.9%	35	16.9%	8	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Tesco, Chepstow	6.9%	42	1.3%	1	1.3%	1	0.0%	0	0.0%	0	26.6%	41	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ross-on-Wye	6.5%	40	1.3%	1	0.0%	0	0.0%	0	6.5%	3	1.3%	2	36.5%	31	2.9%	2	1.3%	1
Budgens, Newent	5.9%	36	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	4.3%	2	46.8%	33
Tesco, Lydney	5.3%	32	29.3%	26	6.3%	4	0.0%	0	1.3%	1	0.0%	0	1.4%	1	0.0%	0	1.3%	1
Waitrose, Monmouth	4.0%	25	0.0%	0	1.3%	1	0.0%	0	0.0%	0	12.7%	19	5.4%	5	0.0%	0	0.0%	0
Co-Op, Coleford	3.9%	24	0.0%	0	36.3%	22	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Local stores, Newent	3.5%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1	27.3%	19
Somerfield, Chepstow	3.5%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	21	0.0%	0	0.0%	0	0.0%	0
Somerfield, Lydney	3.2%	19	20.0%	18	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Co-Op, Lydney	3.1%	19	18.7%	17	2.5%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Monmouth	3.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.4%	17	1.4%	1	0.0%	0	0.0%	0
Somerfield, Ross-on-Wye	3.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.6%	18	0.0%	0	0.0%	0
Local stores, Ross-On-Wye	2.6%	16	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	17.6%	15	0.0%	0	0.0%	0
Somerfield, Monmouth	2.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	14	0.0%	0	0.0%	0	0.0%	0
Somerfield, Coleford	1.9%	11	1.3%	1	13.8%	8	1.2%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Cinderford	1.8%	11	0.0%	0	0.0%	0	16.1%	8	2.6%	1	0.0%	0	0.0%	0	1.4%	1	1.3%	1
Local stores, Mitcheldean	1.8%	11	0.0%	0	0.0%	0	0.0%	0	22.1%	10	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Bulwark	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	10	0.0%	0	0.0%	0	0.0%	0
Local stores, Chepstow	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	10	0.0%	0	0.0%	0	0.0%	0
Local stores, Bream	1.5%	9	10.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Coleford	1.5%	9	0.0%	0	13.8%	8	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Cinderford	1.4%	9	0.0%	0	1.3%	1	9.9%	5	3.9%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco, St Oswalds Park, Gloucester	1.3%	8	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.4%	1	10.0%	5	1.3%	1
Tesco Express, Coleford	1.2%	8	0.0%	0	12.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Newnham-on-Severn	1.1%	7	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	11.4%	6	0.0%	0
Tesco, Gloucester Business Park, Gloucester	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	5	1.3%	1
Local stores, Gloucester	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	5	1.3%	1
Local stores, Ruardean	0.9%	5	0.0%	0	0.0%	0	0.0%	0	7.8%	4	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Local stores, Lydney	0.8%	5	5.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Gloucester	0.7%	4	0.0%	0	2.5%	2	2.5%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Local stores, Yorkley	0.7%	4	2.7%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Local stores, Longhope	0.7%	4	0.0%	0	0.0%	0	0.0%	0	5.2%	2	0.0%	0	0.0%	0	1.4%	1	1.3%	1
Local stores, Sedbury	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
Local stores, Tutshill	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
Local stores, Redbrook	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Gloucester	0.6%	4	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	4.3%	2	0.0%	0
Local stores, Whitecroft	0.6%	4	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Ross-on-Wye	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3	0.0%	0	0.0%	0
Local stores, Lydbrook	0.5%	3	0.0%	0	1.3%	1	0.0%	0	5.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Hartpury	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	0.0%	0
Co-Op, High Street, Mitcheldean	0.5%	3	0.0%	0	0.0%	0	0.0%	0	6.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Ashleworth	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	2.6%	2
Local stores, Tewkesbury	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	2.6%	2
Marks & Spencer, North Gate Street, Gloucester	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0
Local stores, Newland	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0
Local stores, Whitchurch	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0
Local stores, Bury Hill	0.3%	2	0.0%	0	2.5%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Tintern Abbey	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Chepstow	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Co-Op, Newent	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2
Local stores, Drybrook	0.3%	2	0.0%	0	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Highnam	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Local stores, Hanham	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Local stores, Alvington	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Monmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Tesco, Bewell Street, Hereford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local stores, Gorsley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local stores, Leigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local stores, Symonds	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Waitrose, Cheltenham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Ledbury Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Sainsbury's, Cheltenham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Tesco, Orchard Lane,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Ledbury																		
Local stores, Dymock	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Local stores, Bromsberrow Heath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco Express, Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Morrisons, Whitchurch Street, Shrewsbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Morrisons, Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Netherend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Corse	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco, Quedgeley, Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Marks & Spencer, Cheltenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Quedgeley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Milkwall	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Broadwell	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Littledean	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Joys Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Blaisdon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		612		89		60		52		47		152		85		55		71
Sample:		613		75		80		81		77		79		74		70		77

Q08 In which town centre, freestanding store, or retail park do you do most of your household's shopping for clothes, footwear and other fashion goods ?

Those who do not use the internet to do their clothes, footwear and other fashion goods shopping at Q08

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	44.4%	297	60.0%	60	62.2%	39	77.8%	45	72.8%	36	5.1%	8	14.9%	15	65.9%	42	62.9%	52
Hereford	10.3%	69	0.0%	0	4.9%	3	1.1%	1	1.2%	1	7.6%	12	50.6%	50	0.0%	0	3.4%	3
Cheltenham	8.7%	58	4.7%	5	4.9%	3	3.3%	2	7.4%	4	0.0%	0	8.0%	8	28.0%	18	22.5%	18
Bristol	7.3%	48	9.4%	9	6.1%	4	2.2%	1	0.0%	0	21.5%	33	1.1%	1	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Bristol	7.1%	47	7.1%	7	2.4%	2	0.0%	0	1.2%	1	24.1%	37	0.0%	0	2.4%	2	0.0%	0
Monmouth	5.4%	36	3.5%	4	13.4%	8	0.0%	0	3.7%	2	12.7%	19	3.4%	3	0.0%	0	0.0%	0
Ross-on-Wye	4.6%	30	0.0%	0	1.2%	1	2.2%	1	8.6%	4	0.0%	0	19.5%	20	0.0%	0	5.6%	5
Newport	4.2%	28	1.2%	1	0.0%	0	0.0%	0	0.0%	0	17.7%	27	0.0%	0	0.0%	0	0.0%	0
Chepstow	1.7%	11	3.5%	4	0.0%	0	0.0%	0	0.0%	0	5.1%	8	0.0%	0	0.0%	0	0.0%	0
Cinderford	1.4%	9	0.0%	0	0.0%	0	11.1%	6	3.7%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Lydney	1.1%	7	7.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff	0.9%	6	1.2%	1	1.2%	1	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
Newent	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	4.5%	4
Cwmbram	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
London	0.5%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Coleford	0.3%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Weston-Super-Mare	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shrewsbury Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Tewkesbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Retail Warehouse / Retail Park in Cheltenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burtons, Abergavenny	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		669		101		62		58		50		152		100		64		82
Sample:		675		85		82		90		81		79		87		82		89

Q09 In which town centre, freestanding store, or retail park do you do most of your household's shopping for furniture, floor coverings and household textiles ?
Those who do not use the internet to do their furniture, floor coverings and household textiles shopping at Q09

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	38.1%	208	45.8%	39	49.3%	25	67.1%	33	65.2%	26	4.1%	6	20.0%	14	58.7%	29	59.1%	36
Bristol	9.5%	52	12.5%	11	7.5%	4	3.9%	2	6.1%	2	15.1%	21	8.3%	6	7.9%	4	3.0%	2
Hereford	8.0%	43	0.0%	0	3.0%	2	0.0%	0	1.5%	1	6.8%	10	43.3%	30	0.0%	0	3.0%	2
Newport	6.8%	37	2.8%	2	0.0%	0	0.0%	0	0.0%	0	24.7%	35	0.0%	0	0.0%	0	0.0%	0
Cheltenham	5.9%	32	4.2%	4	3.0%	2	5.3%	3	6.1%	2	0.0%	0	1.7%	1	22.2%	11	16.7%	10
Chepstow	5.4%	29	4.2%	4	1.5%	1	0.0%	0	0.0%	0	17.8%	25	0.0%	0	0.0%	0	0.0%	0
Coleford	4.4%	24	6.9%	6	20.9%	11	5.3%	3	4.5%	2	1.4%	2	0.0%	0	0.0%	0	1.5%	1
Monmouth	3.7%	20	1.4%	1	4.5%	2	0.0%	0	0.0%	0	9.6%	14	5.0%	3	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Bristol	3.6%	20	5.6%	5	0.0%	0	0.0%	0	1.5%	1	9.6%	14	0.0%	0	1.6%	1	0.0%	0
Ross-on-Wye	3.4%	18	0.0%	0	3.0%	2	0.0%	0	6.1%	2	1.4%	2	16.7%	11	0.0%	0	1.5%	1
Retail Warehouse / Retail Park in Gloucester	2.2%	12	4.2%	4	3.0%	2	3.9%	2	1.5%	1	1.4%	2	0.0%	0	1.6%	1	3.0%	2
Lydney	2.0%	11	11.1%	9	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Cinderford	2.0%	11	0.0%	0	0.0%	0	13.2%	6	6.1%	2	0.0%	0	1.7%	1	1.6%	1	0.0%	0
Cardiff	1.9%	10	0.0%	0	1.5%	1	1.3%	1	0.0%	0	5.5%	8	1.7%	1	0.0%	0	0.0%	0
Newent	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	6.1%	4
Ledbury Town	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	3.0%	2
Retail Warehouse / Retail Park in Cheltenham	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	2
Other Retail Warehouse / Retail Park	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
London	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Bream Town Centre	0.2%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tewkesbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Argos, Abergavenny	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		545		85		51		49		40		141		69		49		61
Sample:		543		72		67		76		66		73		60		63		66

Q10 In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods ?
Those who do not use the internet to do their DIY and decorating goods shopping at Q10

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	28.6%	189	34.1%	33	43.2%	26	46.7%	27	38.6%	20	0.0%	0	15.4%	14	52.5%	33	47.0%	36
Ross-on-Wye	14.3%	95	3.7%	4	22.2%	14	8.9%	5	32.5%	17	2.4%	4	55.1%	49	2.5%	2	1.2%	1
Chepstow	8.2%	54	8.5%	8	2.5%	2	0.0%	0	0.0%	0	27.1%	44	0.0%	0	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Gloucester	7.4%	49	7.3%	7	8.6%	5	5.6%	3	10.8%	6	1.2%	2	1.3%	1	30.0%	19	7.2%	6
Monmouth	6.1%	41	1.2%	1	0.0%	0	0.0%	0	0.0%	0	21.2%	35	5.1%	5	0.0%	0	0.0%	0
Other Retail Warehouse / Retail Park	5.0%	33	4.9%	5	0.0%	0	1.1%	1	2.4%	1	14.1%	23	3.8%	3	0.0%	0	0.0%	0
Newport	4.5%	29	2.4%	2	0.0%	0	0.0%	0	0.0%	0	16.5%	27	0.0%	0	0.0%	0	0.0%	0
Cinderford	4.3%	28	0.0%	0	0.0%	0	33.3%	19	9.6%	5	0.0%	0	0.0%	0	6.3%	4	0.0%	0
Lydney	3.7%	24	24.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Newent	3.6%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	1.2%	1	25.3%	19
Coleford	2.7%	18	4.9%	5	17.3%	11	1.1%	1	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Hereford	2.6%	17	0.0%	0	2.5%	2	0.0%	0	0.0%	0	2.4%	4	12.8%	11	0.0%	0	0.0%	0
Bristol	2.1%	14	2.4%	2	0.0%	0	0.0%	0	0.0%	0	7.1%	12	0.0%	0	0.0%	0	0.0%	0
Ledbury	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	1.2%	1	10.8%	8
Retail Warehouse / Retail Park in Bristol	1.5%	10	2.4%	2	0.0%	0	0.0%	0	0.0%	0	4.7%	8	0.0%	0	0.0%	0	0.0%	0
Cheltenham	1.5%	10	1.2%	1	1.2%	1	2.2%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	3	4.8%	4
Drybrook	1.1%	7	2.4%	2	1.2%	1	1.1%	1	4.8%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Cardiff	0.4%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Cheltenham	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2
Abergavenny	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Tewkesbury Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Worcester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		660		97		61		58		51		164		89		63		77
Sample:		662		82		81		90		83		85		78		80		83

Q11 In which town centre, freestanding store, or retail park do you do most of your household's shopping for domestic appliances such as washing machines, fridges, cookers and kettles ?
Those who do not use the internet to do their domestic appliances such as washing machines, fridges, cookers and kettles shopping at Q11

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	36.6%	222	36.8%	33	38.2%	22	44.6%	24	60.9%	26	1.4%	2	14.7%	13	81.8%	49	69.0%	54
Ross-on-Wye	8.8%	53	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	57.3%	49	0.0%	0	2.4%	2
Lydney	6.6%	40	34.2%	31	3.9%	2	3.6%	2	0.0%	0	2.8%	4	1.3%	1	0.0%	0	0.0%	0
Coleford	6.3%	38	10.5%	9	40.8%	23	1.2%	1	11.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cinderford	6.1%	37	2.6%	2	0.0%	0	44.6%	24	13.0%	6	1.4%	2	0.0%	0	3.9%	2	1.2%	1
Newport	5.8%	35	2.6%	2	0.0%	0	0.0%	0	0.0%	0	23.6%	33	0.0%	0	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Bristol	5.6%	34	9.2%	8	0.0%	0	0.0%	0	0.0%	0	18.1%	25	0.0%	0	1.3%	1	0.0%	0
Monmouth	5.6%	34	0.0%	0	2.6%	2	0.0%	0	1.4%	1	19.4%	27	5.3%	5	0.0%	0	0.0%	0
Bristol	3.5%	21	3.9%	4	2.6%	2	0.0%	0	2.9%	1	9.7%	14	1.3%	1	0.0%	0	0.0%	0
Hereford	3.1%	19	0.0%	0	1.3%	1	0.0%	0	0.0%	0	4.2%	6	13.3%	11	0.0%	0	1.2%	1
Retail Warehouse / Retail Park in Gloucester	3.0%	18	0.0%	0	6.6%	4	3.6%	2	2.9%	1	0.0%	0	1.3%	1	9.1%	5	6.0%	5
Chepstow	2.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	14	0.0%	0	0.0%	0	0.0%	0
Cheltenham	1.9%	12	0.0%	0	2.6%	2	2.4%	1	2.9%	1	1.4%	2	1.3%	1	1.3%	1	4.8%	4
Ledbury	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	2.6%	2	6.0%	5
Cardiff	0.8%	5	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0	0.0%	0
Other Retail Warehouse / Retail Park	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	2.7%	2	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Cheltenham	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4
Newent	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3
Caldicot	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Currys, The Gallery, Wolverhampton	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Cwmbran	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Worcester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Weighted base:		606		90		57		53		42		139		86		60		78
Sample:		612		76		76		83		69		72		75		77		84

Q12 In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment ?
Those who do not use the internet to do their TV, Hi Fi, Radio, Photographic and Computer equipment shopping at Q12

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	40.3%	207	32.8%	24	69.2%	34	57.8%	31	69.1%	23	1.5%	2	16.7%	11	75.4%	36	71.4%	46
Hereford	8.3%	43	0.0%	0	3.1%	2	0.0%	0	1.8%	1	7.7%	10	43.3%	30	0.0%	0	1.4%	1
Newport	7.3%	38	1.6%	1	0.0%	0	0.0%	0	0.0%	0	29.2%	37	0.0%	0	0.0%	0	0.0%	0
Lydney	6.9%	35	37.7%	27	3.1%	2	6.0%	3	0.0%	0	1.5%	2	0.0%	0	3.3%	2	0.0%	0
Retail Warehouse / Retail Park in Bristol	6.3%	33	8.2%	6	3.1%	2	0.0%	0	0.0%	0	20.0%	25	0.0%	0	0.0%	0	0.0%	0
Bristol	4.6%	24	9.8%	7	3.1%	2	0.0%	0	1.8%	1	10.8%	14	0.0%	0	0.0%	0	1.4%	1
Chepstow	4.4%	23	4.9%	4	0.0%	0	0.0%	0	0.0%	0	15.4%	19	0.0%	0	0.0%	0	0.0%	0
Ross-on-Wye	4.3%	22	0.0%	0	0.0%	0	1.2%	1	1.8%	1	0.0%	0	30.0%	21	0.0%	0	0.0%	0
Cinderford	3.9%	20	0.0%	0	1.5%	1	27.7%	15	7.3%	2	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Cheltenham	3.7%	19	1.6%	1	1.5%	1	2.4%	1	9.1%	3	0.0%	0	3.3%	2	6.6%	3	11.4%	7
Retail Warehouse / Retail Park in Gloucester	3.0%	15	3.3%	2	3.1%	2	4.8%	3	3.6%	1	0.0%	0	1.7%	1	9.8%	5	2.9%	2
Monmouth	2.2%	11	0.0%	0	0.0%	0	0.0%	0	1.8%	1	7.7%	10	1.7%	1	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Cheltenham	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	5
Coleford	0.9%	5	0.0%	0	9.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	4	0.0%	0	0.0%	0	0.0%	0
Other Retail Warehouse / Retail Park	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	1.7%	1	0.0%	0	0.0%	0
Ledbury	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	2.9%	2
Malvern	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.4%	1
Worcester	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Singapore	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Argos, Abergavenny	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cirencester Town Centre	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tewkesbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		515		72		49		53		34		125		69		48		65
Sample:		520		61		65		83		55		65		60		61		70

Q13 In which town centre, freestanding store or retail park do you do most of your household's shopping on personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods ?

Those who do not use the internet to do their personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	33.7%	193	34.3%	27	47.1%	24	60.5%	32	65.2%	28	2.8%	4	13.7%	11	61.8%	33	48.1%	34
Ross-on-Wye	9.1%	52	0.0%	0	0.0%	0	1.2%	1	15.9%	7	0.0%	0	53.4%	45	0.0%	0	0.0%	0
Chepstow	8.2%	47	4.5%	4	1.5%	1	0.0%	0	0.0%	0	30.6%	42	0.0%	0	0.0%	0	0.0%	0
Monmouth	7.7%	44	4.5%	4	11.8%	6	0.0%	0	0.0%	0	22.2%	31	4.1%	3	0.0%	0	0.0%	0
Cheltenham	7.1%	41	4.5%	4	2.9%	2	1.2%	1	5.8%	2	0.0%	0	4.1%	3	22.1%	12	24.7%	18
Bristol	5.0%	29	10.4%	8	10.3%	5	1.2%	1	0.0%	0	9.7%	14	0.0%	0	1.5%	1	0.0%	0
Retail Warehouse / Retail Park in Bristol	4.9%	28	7.5%	6	0.0%	0	0.0%	0	0.0%	0	15.3%	21	0.0%	0	1.5%	1	0.0%	0
Hereford	4.9%	28	0.0%	0	2.9%	2	1.2%	1	1.4%	1	4.2%	6	21.9%	18	0.0%	0	1.3%	1
Lydney	4.6%	26	31.3%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Cinderford	3.7%	21	0.0%	0	0.0%	0	32.1%	17	7.2%	3	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Newent	3.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	2.9%	2	20.8%	15
Coleford	2.2%	12	1.5%	1	20.6%	11	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newport	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	10	0.0%	0	0.0%	0	0.0%	0
Cardiff	0.8%	5	0.0%	0	1.5%	1	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0	0.0%	0
Ledbury	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	5.2%	4
London	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Plymouth Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Cwmbran	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Cwmbran Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Local stores, Mitcheldean	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Bream	0.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Newham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Tewkesbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Local stores, Buryhill	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Gloucester	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		572		79		51		52		42		139		84		53		71
Sample:		575		67		68		81		69		72		73		68		77

Q14 In which town centre, freestanding store or retail park do you do most of your household's shopping on recreational goods including bicycles, games, toys, sports and camping equipment ?

Those who do not use the internet to do their recreational goods including bicycles, games, toys, sports and camping equipment at Q14

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gloucester	47.6%	159	54.5%	28	69.6%	24	79.2%	24	84.2%	20	6.8%	6	17.6%	7	71.8%	22	71.4%	28
Retail Warehouse / Retail Park in Cheltenham	6.5%	22	6.8%	4	2.2%	1	0.0%	0	0.0%	0	20.5%	17	0.0%	0	0.0%	0	0.0%	0
Bristol	6.0%	20	9.1%	5	8.7%	3	0.0%	0	2.6%	1	13.6%	12	0.0%	0	0.0%	0	0.0%	0
Cheltenham	5.9%	20	2.3%	1	6.5%	2	2.1%	1	7.9%	2	0.0%	0	5.9%	2	23.1%	7	11.9%	5
Newport	5.8%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.7%	19	0.0%	0	0.0%	0	0.0%	0
Hereford	5.6%	19	0.0%	0	2.2%	1	0.0%	0	0.0%	0	6.8%	6	26.5%	10	0.0%	0	4.8%	2
Ross-on-Wye	5.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.2%	16	0.0%	0	2.4%	1
Chepstow	3.2%	11	2.3%	1	0.0%	0	0.0%	0	0.0%	0	11.4%	10	0.0%	0	0.0%	0	0.0%	0
Lydney	3.1%	10	18.2%	9	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Monmouth	2.8%	9	2.3%	1	0.0%	0	0.0%	0	0.0%	0	6.8%	6	5.9%	2	0.0%	0	0.0%	0
Cinderford	2.1%	7	0.0%	0	2.2%	1	12.5%	4	2.6%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff	1.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	6	0.0%	0	0.0%	0	0.0%	0
Retail Warehouse / Retail Park in Gloucester	0.9%	3	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0	0.0%	0	5.1%	2	0.0%	0
Newent	0.6%	2	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Raglan	0.6%	2	2.3%	1	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abergavenny	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Other Retail Warehouse / Retail Park	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Leominster	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Local stores, Westminster	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Tewkesbury	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
St Austell	0.2%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coleford	0.2%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	0.2%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ledbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		334		52		35		31		23		85		39		31		39
Sample:		335		44		46		48		38		44		34		39		42

Forest of Dean Household Telephone Survey for GVA Grimley

Q15 How does your household normally travel when undertaking shopping for non-food goods ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Car / van (as driver)	63.1%	507	59.4%	71	67.0%	51	59.0%	38	71.0%	44	55.9%	110	67.0%	77	69.0%	54	68.0%	63
Car / van (as passenger)	17.9%	144	23.8%	28	24.0%	18	17.0%	11	12.0%	7	19.6%	39	16.0%	18	13.0%	10	13.0%	12
Bus	8.2%	66	7.9%	9	5.0%	4	11.0%	7	11.0%	7	10.8%	21	5.0%	6	8.0%	6	6.0%	6
Motorcycle	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	4.4%	35	1.0%	1	2.0%	2	10.0%	6	3.0%	2	6.9%	14	8.0%	9	1.0%	1	1.0%	1
Taxi	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Train	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
Bicycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Internet / mail order / delivered	0.3%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other	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
(Don't know / varies)	5.7%	46	6.9%	8	2.0%	2	2.0%	1	2.0%	1	6.9%	14	3.0%	3	7.0%	5	12.0%	11
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

Q16 Do you ever use the internet for shopping ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	45.6%	366	47.5%	57	52.0%	39	33.0%	21	46.0%	28	43.1%	85	55.0%	63	43.0%	34	42.0%	39
No	54.4%	437	52.5%	63	48.0%	36	67.0%	43	54.0%	33	56.9%	112	45.0%	52	57.0%	45	58.0%	54
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

Q17 How often do you use the internet for shopping ?
Those who use the internet for shopping at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Every week	18.4%	67	10.4%	6	13.5%	5	24.2%	5	21.7%	6	20.5%	17	23.6%	15	20.9%	7	14.3%	6
Every month	37.1%	136	33.3%	19	38.5%	15	30.3%	6	41.3%	12	31.8%	27	38.2%	24	41.9%	14	47.6%	18
Occasionally	28.4%	104	37.5%	21	32.7%	13	30.3%	6	21.7%	6	31.8%	27	23.6%	15	23.3%	8	19.0%	7
Rarely	15.4%	56	16.7%	9	13.5%	5	15.2%	3	15.2%	4	15.9%	14	14.5%	9	11.6%	4	19.0%	7
(Don't know)	0.7%	3	2.1%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Weighted base:		366		57		39		21		28		85		63		34		39
Sample:		363		48		52		33		46		44		55		43		42

Q18 On average, how much money do you spend on internet shopping every month ?
Those who use the internet for shopping at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£0 - 5	6.6%	24	20.8%	12	1.9%	1	3.0%	1	4.3%	1	2.3%	2	5.5%	3	7.0%	2	4.8%	2
£6 - 10	5.4%	20	6.3%	4	9.6%	4	3.0%	1	2.2%	1	6.8%	6	3.6%	2	9.3%	3	0.0%	0
£11 - 20	10.3%	38	4.2%	2	7.7%	3	9.1%	2	8.7%	2	9.1%	8	9.1%	6	20.9%	7	19.0%	7
£21 - 30	7.2%	26	6.3%	4	7.7%	3	15.2%	3	2.2%	1	4.5%	4	16.4%	10	0.0%	0	4.8%	2
£31 - 40	3.6%	13	2.1%	1	3.8%	2	6.1%	1	4.3%	1	2.3%	2	1.8%	1	11.6%	4	2.4%	1
£41 - 50	10.5%	38	6.3%	4	7.7%	3	15.2%	3	8.7%	2	13.6%	12	5.5%	3	16.3%	5	14.3%	6
£51 - 60	1.9%	7	0.0%	0	0.0%	0	0.0%	0	4.3%	1	4.5%	4	0.0%	0	2.3%	1	2.4%	1
£61 - 70	1.2%	4	2.1%	1	3.8%	2	0.0%	0	2.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
£71 - 80	0.7%	3	0.0%	0	3.8%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
£81 - 90	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
£91 - 100	9.8%	36	2.1%	1	7.7%	3	15.2%	3	6.5%	2	18.2%	15	5.5%	3	9.3%	3	11.9%	5
£100+	6.6%	24	8.3%	5	7.7%	3	3.0%	1	15.2%	4	2.3%	2	10.9%	7	0.0%	0	7.1%	3
(Don't know / varies)	33.1%	121	37.5%	21	34.6%	14	30.3%	6	32.6%	9	31.8%	27	36.4%	23	23.3%	8	33.3%	13
(Refused)	2.6%	9	4.2%	2	3.8%	2	0.0%	0	8.7%	2	2.3%	2	1.8%	1	0.0%	0	0.0%	0
Mean:		*50.1*		*38.9*		*53.9*		*48.3*		*69.1*		*53.7*		*53.8*		*33.7*		*52.6*
Weighted base:		366		57		39		21		28		85		63		34		39
Sample:		363		48		52		33		46		44		55		43		42

Q19 What type of goods do you purchase via the internet ?
Those who use the internet for shopping at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Personal / luxury goods, including books, jewellery, china, glass, cosmetics & medical goods	50.8%	186	35.4%	20	30.8%	12	51.5%	11	65.2%	18	45.5%	39	69.1%	44	62.8%	21	54.8%	21
Recreational goods, including bicycles, games, toys, sports & camping equipment	32.4%	119	33.3%	19	32.7%	13	30.3%	6	34.8%	10	36.4%	31	25.5%	16	37.2%	13	28.6%	11
TV, Hi Fi, Radio, Photographic & Computer equipment	31.0%	113	45.8%	26	32.7%	13	24.2%	5	28.3%	8	18.2%	15	30.9%	20	37.2%	13	35.7%	14
Clothing & Footwear	30.4%	111	27.1%	15	30.8%	12	27.3%	6	26.1%	7	34.1%	29	29.1%	18	27.9%	9	35.7%	14
Domestic appliances	14.4%	53	16.7%	9	17.3%	7	18.2%	4	8.7%	2	11.4%	10	20.0%	13	7.0%	2	14.3%	6
Food and grocery items	11.9%	43	6.3%	4	3.8%	2	6.1%	1	15.2%	4	11.4%	10	16.4%	10	16.3%	5	19.0%	7
Holidays	10.7%	39	4.2%	2	15.4%	6	6.1%	1	8.7%	2	9.1%	8	18.2%	11	9.3%	3	11.9%	5
Floor coverings & household textiles	10.0%	37	8.3%	5	11.5%	5	9.1%	2	8.7%	2	13.6%	12	7.3%	5	11.6%	4	7.1%	3
DIY & Decorating goods	7.0%	26	12.5%	7	11.5%	5	3.0%	1	8.7%	2	2.3%	2	3.6%	2	9.3%	3	9.5%	4
Car accessories / parts	3.3%	12	4.2%	2	0.0%	0	0.0%	0	0.0%	0	9.1%	8	1.8%	1	0.0%	0	2.4%	1
Large electrical items	2.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.4%	10	0.0%	0	0.0%	0	2.4%	1
Gardening equipment	2.1%	8	0.0%	0	3.8%	2	0.0%	0	2.2%	1	2.3%	2	0.0%	0	0.0%	0	9.5%	4
Stationary goods / arts & crafts	2.0%	7	0.0%	0	0.0%	0	0.0%	0	2.2%	1	6.8%	6	0.0%	0	0.0%	0	2.4%	1
Other	1.5%	5	2.1%	1	1.9%	1	0.0%	0	2.2%	1	2.3%	2	0.0%	0	0.0%	0	2.4%	1
Theatre / concert tickets	1.2%	4	2.1%	1	1.9%	1	0.0%	0	2.2%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.8%	14	6.3%	4	0.0%	0	0.0%	0	2.2%	1	6.8%	6	1.8%	1	2.3%	1	4.8%	2
Weighted base:		366		57		39		21		28		85		63		34		39
Sample:		363		48		52		33		46		44		55		43		42

Q20 Of the following centres which do you consider your main centre ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Lydney	18.9%	152	91.1%	109	9.0%	7	5.0%	3	2.0%	1	10.8%	21	0.0%	0	13.0%	10	0.0%	0
Cinderford	14.7%	118	2.0%	2	1.0%	1	94.0%	61	59.0%	36	2.0%	4	5.0%	6	11.0%	9	0.0%	0
Newent	12.8%	102	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	2	5.0%	6	33.0%	26	74.0%	68
Coleford	12.5%	100	4.0%	5	89.0%	67	1.0%	1	9.0%	6	8.8%	17	4.0%	5	0.0%	0	0.0%	0
(None of these)	41.2%	331	3.0%	4	1.0%	1	0.0%	0	29.0%	18	77.5%	152	86.0%	99	43.0%	34	26.0%	24
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

Q21 What do you most like about (centre mentioned Q20) ?
Those who named a centre at Q20

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Near / convenient	45.5%	215	53.1%	62	51.5%	39	50.0%	32	38.0%	17	30.4%	14	7.1%	1	28.1%	13	56.8%	39
Selection / choice multiple shops	15.1%	71	14.3%	17	18.2%	14	11.0%	7	12.7%	6	17.4%	8	21.4%	3	15.8%	7	14.9%	10
Selection / choice of independent shops	11.0%	52	8.2%	9	15.2%	11	11.0%	7	8.5%	4	8.7%	4	21.4%	3	19.3%	9	6.8%	5
Pedestrian friendly environment	10.3%	49	6.1%	7	5.1%	4	10.0%	6	2.8%	1	17.4%	8	0.0%	0	17.5%	8	21.6%	15
Pleasant / friendly shopping environment	4.8%	23	5.1%	6	3.0%	2	4.0%	3	1.4%	1	13.0%	6	0.0%	0	1.8%	1	6.8%	5
Easy parking	4.2%	20	2.0%	2	7.1%	5	1.0%	1	7.0%	3	4.3%	2	7.1%	1	12.3%	5	0.0%	0
Particular foodstore	3.5%	17	4.1%	5	3.0%	2	2.0%	1	1.4%	1	13.0%	6	7.1%	1	1.8%	1	0.0%	0
Small / compact	2.9%	14	2.0%	2	3.0%	2	1.0%	1	2.8%	1	4.3%	2	7.1%	1	5.3%	2	2.7%	2
Cheap parking	2.8%	13	6.1%	7	2.0%	2	0.0%	0	0.0%	0	0.0%	0	7.1%	1	3.5%	2	2.7%	2
Feels safe	2.7%	13	4.1%	5	1.0%	1	2.0%	1	0.0%	0	4.3%	2	7.1%	1	0.0%	0	4.1%	3
Other	2.4%	11	2.0%	2	2.0%	2	1.0%	1	1.4%	1	8.7%	4	0.0%	0	3.5%	2	1.4%	1
Leisure facilities	2.4%	11	1.0%	1	2.0%	2	2.0%	1	0.0%	0	8.7%	4	0.0%	0	5.3%	2	1.4%	1
Financial services (banks / building societies, etc)	2.1%	10	2.0%	2	1.0%	1	1.0%	1	4.2%	2	0.0%	0	0.0%	0	3.5%	2	4.1%	3
Close to friends / relatives	1.5%	7	2.0%	2	0.0%	0	1.0%	1	0.0%	0	4.3%	2	7.1%	1	1.8%	1	0.0%	0
Good public transport links	0.8%	4	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Cleanliness of streets	0.7%	3	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Competitive prices	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	1.4%	1
Coastal location	0.5%	3	0.0%	0	0.0%	0	3.0%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good layout	0.5%	2	1.0%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Evening entertainment	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	14.8%	70	13.3%	15	12.1%	9	18.0%	12	29.6%	13	4.3%	2	7.1%	1	17.5%	8	14.9%	10
(Don't know / can't remember)	2.3%	11	1.0%	1	1.0%	1	2.0%	1	2.8%	1	4.3%	2	28.6%	5	0.0%	0	0.0%	0
Weighted base:		472		116		75		64		44		44		16		45		68
Sample:		536		98		99		100		71		23		14		57		74

Q22 What do you most dislike about (centre mentioned at Q20) ?
Those who named a centre at Q20

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Poor selection / choice of multiple shops	17.0%	80	19.4%	22	28.3%	21	25.0%	16	19.7%	9	13.0%	6	14.3%	2	0.0%	0	5.4%	4
Unattractive environment / dirty streets / litter	6.3%	30	8.2%	9	2.0%	2	12.0%	8	8.5%	4	0.0%	0	14.3%	2	5.3%	2	4.1%	3
Selection / choice of independent shops	5.7%	27	6.1%	7	11.1%	8	4.0%	3	12.7%	6	0.0%	0	7.1%	1	5.3%	2	0.0%	0
Lack of safety / personal security / hooligans	5.0%	24	4.1%	5	6.1%	5	10.0%	6	4.2%	2	4.3%	2	0.0%	0	3.5%	2	4.1%	3
Difficult parking	4.8%	22	3.1%	4	3.0%	2	9.0%	6	4.2%	2	0.0%	0	7.1%	1	5.3%	2	8.1%	6
Poor pedestrian environment / pavements / roads in need of repair	3.1%	15	0.0%	0	4.0%	3	4.0%	3	4.2%	2	8.7%	4	0.0%	0	5.3%	2	1.4%	1
Lack of particular store	3.1%	15	4.1%	5	5.1%	4	2.0%	1	2.8%	1	4.3%	2	0.0%	0	3.5%	2	0.0%	0
Traffic congestion	2.2%	11	3.1%	4	1.0%	1	0.0%	0	1.4%	1	4.3%	2	0.0%	0	0.0%	0	5.4%	4
Other	2.1%	10	2.0%	2	0.0%	0	1.0%	1	2.8%	1	4.3%	2	7.1%	1	1.8%	1	2.7%	2
Poor layout	2.0%	10	3.1%	4	2.0%	2	1.0%	1	2.8%	1	4.3%	2	0.0%	0	1.8%	1	0.0%	0
Too many charity shops	1.7%	8	4.1%	5	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Too many vacant shops	1.3%	6	2.0%	2	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	3
Poor public transport	0.9%	4	3.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Poor / limited leisure facilities	0.9%	4	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.4%	1
Too far from home	0.5%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too expensive	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Lack of services (banks / building societies etc)	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	50.6%	239	42.9%	50	45.5%	34	42.0%	27	49.3%	21	60.9%	27	42.9%	7	70.2%	31	60.8%	42
(Don't know / can't remember)	1.6%	7	2.0%	2	0.0%	0	1.0%	1	2.8%	1	0.0%	0	14.3%	2	0.0%	0	1.4%	1
Weighted base:		472		116		75		64		44		44		16		45		68
Sample:		536		98		99		100		71		23		14		57		74

Q23 What improvements to the quality and range of facilities in (CENTRE MENTIONED AT Q20) would persuade your household to visit it more often ?
Those who named a centre at Q20

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Improve choice of multiple shops	16.8%	79	16.3%	19	21.2%	16	27.0%	17	18.3%	8	21.7%	10	14.3%	2	5.3%	2	6.8%	5
Improve range of independent / specialist shops	9.7%	46	11.2%	13	9.1%	7	10.0%	6	16.9%	7	13.0%	6	7.1%	1	3.5%	2	5.4%	4
Attract larger retailers	8.0%	38	9.2%	11	9.1%	7	5.0%	3	1.4%	1	21.7%	10	14.3%	2	1.8%	1	5.4%	4
Other new shop	6.1%	29	5.1%	6	5.1%	4	5.0%	3	12.7%	6	4.3%	2	7.1%	1	1.8%	1	9.5%	6
Introduce a larger supermarket	3.7%	18	0.0%	0	4.0%	3	9.0%	6	11.3%	5	4.3%	2	7.1%	1	1.8%	1	0.0%	0
Clean shopping streets	3.3%	16	6.1%	7	1.0%	1	2.0%	1	8.5%	4	0.0%	0	7.1%	1	1.8%	1	1.4%	1
Improved range of places to eat	2.6%	12	5.1%	6	1.0%	1	5.0%	3	2.8%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
More parking spaces - type unspecified	2.5%	12	1.0%	1	4.0%	3	0.0%	0	2.8%	1	0.0%	0	7.1%	1	3.5%	2	5.4%	4
More parking spaces - short stay	2.3%	11	0.0%	0	0.0%	0	7.0%	5	1.4%	1	8.7%	4	0.0%	0	0.0%	0	2.7%	2
Other	2.1%	10	3.1%	4	2.0%	2	0.0%	0	0.0%	0	4.3%	2	7.1%	1	0.0%	0	2.7%	2
Improved play areas for children	2.0%	9	4.1%	5	1.0%	1	4.0%	3	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0
Improve public transport links	1.9%	9	2.0%	2	1.0%	1	0.0%	0	0.0%	0	8.7%	4	7.1%	1	1.8%	1	0.0%	0
New / improved other leisure facilities	1.7%	8	3.1%	4	1.0%	1	0.0%	0	2.8%	1	0.0%	0	0.0%	0	3.5%	2	1.4%	1
Improve policing / other security measures	1.6%	8	3.1%	4	0.0%	0	5.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Refurbish / improve existing shopping facilities	1.6%	7	0.0%	0	2.0%	2	0.0%	0	7.0%	3	4.3%	2	0.0%	0	0.0%	0	1.4%	1
Improved policing / enhance security / CCTV	1.5%	7	1.0%	1	1.0%	1	0.0%	0	5.6%	2	4.3%	2	0.0%	0	1.8%	1	0.0%	0
Reduce road congestion	1.4%	7	2.0%	2	0.0%	0	1.0%	1	4.2%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2
More parking spaces - long stay	1.4%	6	0.0%	0	0.0%	0	5.0%	3	2.8%	1	4.3%	2	0.0%	0	0.0%	0	0.0%	0
Improve street furniture / floral displays	1.1%	5	2.0%	2	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Improve number and attractiveness of meeting places	1.1%	5	1.0%	1	1.0%	1	4.0%	3	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Develop new shopping facilities	1.1%	5	1.0%	1	2.0%	2	0.0%	0	1.4%	1	0.0%	0	0.0%	0	1.8%	1	1.4%	1
More pedestrianisation	1.0%	5	1.0%	1	2.0%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Improve layout of car parks	1.0%	5	0.0%	0	1.0%	1	2.0%	1	4.2%	2	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Less charity shops	0.9%	4	1.0%	1	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Improve market stalls	0.9%	4	0.0%	0	2.0%	2	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	1.4%	1
Improve location of bus stops / bus station	0.7%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	4.3%	2	0.0%	0	1.8%	1	0.0%	0
Encourage reduced shop prices	0.7%	3	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
New department store	0.7%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
New / improved bingo facility	0.5%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / improved cinema	0.5%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve safety of pedestrians	0.4%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Enhanced range of health and fitness centres / gyms	0.4%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attract more people / make more lively	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve access for pushchairs / wheelchairs, etc	0.3%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Enhance shopmobility service	0.3%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reduce cost of parking	0.3%	1	0.0%	0	1.0%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Create more open spaces	0.3%	1	0.0%	0	1.0%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved range of pubs and night clubs	0.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / improved museum or art gallery	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Improve signage / routeways within centre	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
New / improved ten pin bowling centre	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve play areas for children	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attract less people / relieve over-crowding	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing in particular)	35.9%	169	23.5%	27	39.4%	29	34.0%	22	31.0%	13	21.7%	10	28.6%	5	64.9%	29	50.0%	34
(Don't know / can't remember)	5.9%	28	10.2%	12	1.0%	1	2.0%	1	5.6%	2	8.7%	4	14.3%	2	3.5%	2	5.4%	4
Weighted base:		472		116		75		64		44		44		16		45		68
Sample:		536		98		99		100		71		23		14		57		74

Q24 Over the coming months, the Forest of Dean District Council will be considering a proposal for a new Tesco supermarket in Cinderford. If a new Tesco store, selling a range of food and non-food products, was provided in Cinderford would you use this store ?
Those who know whether they would use the proposed store at Q24

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	35.1%	275	20.2%	24	54.1%	40	81.2%	50	72.4%	44	22.2%	42	39.2%	44	23.7%	18	14.1%	13
No	64.9%	508	79.8%	93	45.9%	34	18.7%	12	27.6%	17	77.8%	149	60.8%	68	76.3%	58	85.9%	78
Weighted base:		783		117		74		62		60		191		111		76		91
Sample:		783		99		98		96		98		99		97		97		99

Q25 What type of shopping would you do at this store ?
Those who would use the new proposed store at Q24 and who would shop at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Main food shopping	82.8%	213	52.6%	12	84.9%	34	93.3%	45	85.9%	34	90.0%	35	77.8%	32	75.0%	12	83.3%	9
Top-up food shopping	47.5%	122	47.4%	11	52.8%	21	62.7%	30	65.6%	26	20.0%	8	27.8%	11	60.0%	9	50.0%	6
Buy non-food items (such as CDs, clothes, toys, etc)	53.1%	136	68.4%	15	41.5%	17	56.0%	27	56.2%	22	55.0%	21	58.3%	24	40.0%	6	33.3%	4
Weighted base:		257		22		40		48		39		39		41		16		11
Sample:		299		19		53		75		64		20		36		20		12

Q26 If your household were to undertake its shopping at the new Tesco store in Cinderford, would it also visit OTHER shops, leisure or service outlets in Cinderford on the same shopping trip ?
Those who would use the new proposed store at Q24 and who know if they would do other activities on the same trip as the proposed store at Q26

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Always	17.0%	45	10.5%	2	11.3%	5	26.0%	13	10.8%	4	40.9%	17	2.9%	1	13.0%	2	0.0%	0
Normally	13.0%	34	15.8%	4	1.9%	1	18.2%	9	29.2%	12	4.5%	2	8.6%	3	21.7%	4	0.0%	0
Sometimes	40.4%	107	31.6%	7	43.4%	17	37.7%	19	36.9%	15	27.3%	12	48.6%	20	56.5%	10	66.7%	7
Rarely	7.4%	20	5.3%	1	17.0%	7	6.5%	3	3.1%	1	9.1%	4	5.7%	2	0.0%	0	8.3%	1
Never	22.2%	58	36.8%	8	26.4%	11	11.7%	6	20.0%	8	18.2%	8	34.3%	14	8.7%	2	25.0%	3
Weighted base:		264		22		40		50		40		42		40		18		11
Sample:		306		19		53		77		65		22		35		23		12

Q27 Are you aware of the Forest of Dean District Councils 'First Stop Local Shop' campaign to promote local shopping in the District's Market Towns ?
Those who would use the new proposed store at Q24

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	49.2%	135	75.0%	18	66.0%	26	62.8%	32	46.5%	20	31.8%	14	10.5%	5	69.6%	13	64.3%	8
No	50.8%	140	25.0%	6	34.0%	14	37.2%	19	53.5%	23	68.2%	29	89.5%	39	30.4%	5	35.7%	5
Weighted base:		275		24		40		50		44		42		44		18		13
Sample:		319		20		53		78		71		22		38		23		14

GEN Gender of respondent.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Male	25.5%	205	20.8%	25	27.0%	20	21.0%	14	23.0%	14	24.5%	48	23.0%	26	40.0%	31	28.0%	26
Female	74.5%	598	79.2%	95	73.0%	55	79.0%	51	77.0%	47	75.5%	149	77.0%	88	60.0%	47	72.0%	66
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

AGE Could I ask, how old are you ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
18 to 24	1.1%	9	1.0%	1	0.0%	0	4.0%	3	0.0%	0	1.0%	2	1.0%	1	1.0%	1	1.0%	1
25 to 34	6.7%	54	8.9%	11	10.0%	8	10.0%	6	3.0%	2	6.9%	14	6.0%	7	2.0%	2	6.0%	6
35 to 44	18.9%	152	22.8%	27	20.0%	15	14.0%	9	21.0%	13	24.5%	48	15.0%	17	12.0%	9	14.0%	13
45 to 54	24.8%	199	24.8%	30	33.0%	25	29.0%	19	31.0%	19	17.6%	35	36.0%	41	23.0%	18	14.0%	13
55 to 64	23.0%	185	23.8%	28	15.0%	11	17.0%	11	26.0%	16	18.6%	37	18.0%	21	34.0%	27	37.0%	34
65 +	25.1%	201	18.8%	22	22.0%	17	25.0%	16	18.0%	11	31.4%	62	23.0%	26	28.0%	22	27.0%	25
(Refused)	0.4%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

Column %ges.

CAR How many cars does your household own or have the use of ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
None	10.9%	88	7.9%	9	10.0%	8	17.0%	11	10.0%	6	16.7%	33	9.0%	10	5.0%	4	7.0%	6
One	41.7%	335	45.5%	54	43.0%	33	36.0%	23	40.0%	25	43.1%	85	41.0%	47	42.0%	33	38.0%	35
Two	37.2%	299	36.6%	44	36.0%	27	36.0%	23	39.0%	24	31.4%	62	40.0%	46	46.0%	36	40.0%	37
Three or more	9.6%	77	8.9%	11	11.0%	8	9.0%	6	11.0%	7	7.8%	15	10.0%	11	7.0%	5	14.0%	13
(Refused)	0.7%	5	1.0%	1	0.0%	0	2.0%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0	1.0%	1
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

INC Approximately what is your total household income ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£0 - £15,000	16.5%	132	13.9%	17	21.0%	16	23.0%	15	18.0%	11	15.7%	31	10.0%	11	24.0%	19	14.0%	13
£15,001 - £20,000	7.9%	64	5.9%	7	7.0%	5	4.0%	3	8.0%	5	7.8%	15	12.0%	14	7.0%	5	10.0%	9
£20,001 - £30,000	11.5%	92	8.9%	11	17.0%	13	20.0%	13	16.0%	10	8.8%	17	11.0%	13	9.0%	7	10.0%	9
£30,001 - £40,000	7.6%	61	7.9%	9	8.0%	6	5.0%	3	6.0%	4	9.8%	19	5.0%	6	9.0%	7	7.0%	6
£40,001 - £50,000	6.2%	50	3.0%	4	9.0%	7	4.0%	3	2.0%	1	10.8%	21	5.0%	6	6.0%	5	4.0%	4
£50,001 - £60,000	1.5%	12	3.0%	4	0.0%	0	0.0%	0	1.0%	1	2.0%	4	1.0%	1	0.0%	0	3.0%	3
£60,001 - £70,000	1.3%	11	2.0%	2	0.0%	0	1.0%	1	2.0%	1	1.0%	2	1.0%	1	2.0%	2	2.0%	2
£70,001 - £80,000	1.0%	8	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	2	1.0%	1	2.0%	2	2.0%	2
£80,001 - £90,000	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	1.0%	1
£90,001 - £100,000	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
£100,001 - £150,000	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
£150,001+	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(Don't know / refused)	45.5%	365	55.4%	66	37.0%	28	42.0%	27	45.0%	28	43.1%	85	51.0%	59	39.0%	31	46.0%	42
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

EMP Which of the following best describes the chief wage earner of your household's current employment situation ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Working full time	54.5%	438	62.4%	75	60.0%	45	58.0%	37	56.0%	34	55.9%	110	58.0%	67	42.0%	33	40.0%	37
Working part time	8.4%	68	5.9%	7	9.0%	7	6.0%	4	5.0%	3	5.9%	12	9.0%	10	13.0%	10	16.0%	15
Unemployed	1.4%	11	1.0%	1	3.0%	2	2.0%	1	5.0%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1
Retired	33.6%	270	29.7%	35	27.0%	20	31.0%	20	34.0%	21	33.3%	66	31.0%	36	44.0%	34	41.0%	38
A housewife	0.2%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A student	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
Other	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	1.0%	1
(Refused)	1.2%	9	0.0%	0	0.0%	0	3.0%	2	0.0%	0	2.9%	6	0.0%	0	1.0%	1	1.0%	1
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

SEG Socioeconomic Grouping:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
A	6.2%	50	5.9%	7	3.0%	2	2.0%	1	3.0%	2	8.8%	17	6.0%	7	7.0%	5	8.0%	7
B	18.4%	148	14.9%	18	20.0%	15	14.0%	9	22.0%	13	18.6%	37	22.0%	25	14.0%	11	21.0%	19
C1	27.0%	217	20.8%	25	27.0%	20	26.0%	17	26.0%	16	26.5%	52	29.0%	33	32.0%	25	31.0%	29
C2	24.7%	198	27.7%	33	29.0%	22	29.0%	19	30.0%	18	22.5%	44	22.0%	25	22.0%	17	21.0%	19
D	14.0%	112	24.8%	30	13.0%	10	15.0%	10	10.0%	6	12.7%	25	11.0%	13	14.0%	11	9.0%	8
E	2.0%	16	2.0%	2	4.0%	3	1.0%	1	2.0%	1	1.0%	2	3.0%	3	3.0%	2	1.0%	1
(Refused)	7.8%	62	4.0%	5	4.0%	3	13.0%	8	7.0%	4	9.8%	19	7.0%	8	8.0%	6	9.0%	8
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

QUOTA Zone:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Zone 1	14.9%	120	100.0%	120	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	9.4%	76	0.0%	0	100.0%	76	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	8.0%	64	0.0%	0	0.0%	0	100.0%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	7.6%	61	0.0%	0	0.0%	0	0.0%	0	100.0%	61	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	24.5%	197	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	197	0.0%	0	0.0%	0	0.0%	0
Zone 6	14.3%	115	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	115	0.0%	0	0.0%	0
Zone 7	9.7%	78	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	78	0.0%	0
Zone 8	11.5%	92	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	92
Weighted base:		803		120		76		64		61		197		115		78		92
Sample:		803		101		100		100		100		102		100		100		100

Column %ges.

Appendix C
Pedestrian Flow Analysis

Footfall & Shoppers Surveys, 2007.

Footfall

Times:

- Each location is counted for a continuous period of 15 minutes, followed by a 5 minute slot to relocate to the next location. After the five minutes, the next 15 minute count period begins, and so on.
- Therefore, 5 locations at 15 minutes of counting and a 5 minute changeover, should total 1 hour and 40 minutes of monitoring per set.
- In the case of Lydney, 5 minute intervals are sometimes insufficient to travel to the next location. The nearest time possible should be aimed for.
- Sets should be carried out over two different time periods, as follows:
  1. Morning 10.30 am
  2. Early Afternoon 14.00 pm

Days:

- The above process will be carried out over two days giving an indication of an average Week Day, and an average Saturday
- Days to be avoided are Half-day closing and market days

Counting:

- Persons should be counted passing the count point in **both directions.**
- Exceptions should include: Children appearing under eight, vagrants, post-persons, traffic Wardens, Police, Delivery men.

Locations:

- Locations have been extracted from the 2003 VVV Study, and are the 5 locations that scored the highest footfall counts in each town centre.
- Exceptions however include locations 8 & 9 from Coleford, and Location 7 from Cinderford, which were not included as they are specifically Supermarket sites and were not deemed as giving a true indication of town centre footfall.
- Data collected from the chosen locations will only be directly compared to data from the same sites collected in the VVV 2003 study.

Shoppers Surveys

- Shoppers surveys to be carried out on the same days as the footfall counts, before, in-between and after the counting periods. ie, approximately 9.00-10.30, 30 minutes for lunch, 12.40-14.00 & 15.40-17.00.

- The target number of surveys to be completed on each day is 25. Across all eight survey days, this will result in a sample size of 200 surveys.

- Individuals surveyed should where possible represent and reflect a variety of town centre users, should all be adults and should avoid vagrants, post-persons, traffic Wardens, Police, Delivery men.

Footfall Counts- Phase 1. Summer 2007.

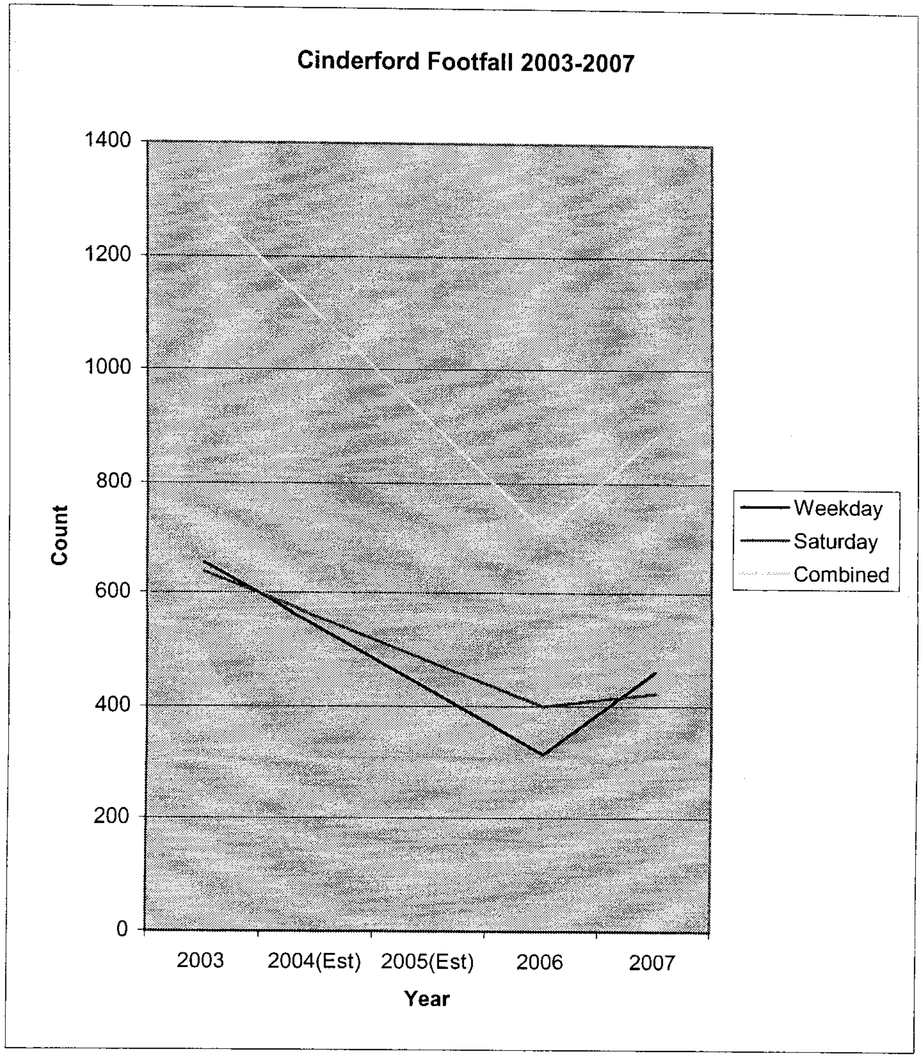
	Cinderford		
	Week	Saturday	Total
2003	655	638	1293
2004(Est)	541	559	1100
2005(Est)	428	479	907
2006	314	400	714
2007	461	423	884
2007- AM	259	239	498
2007- PM	202	184	386

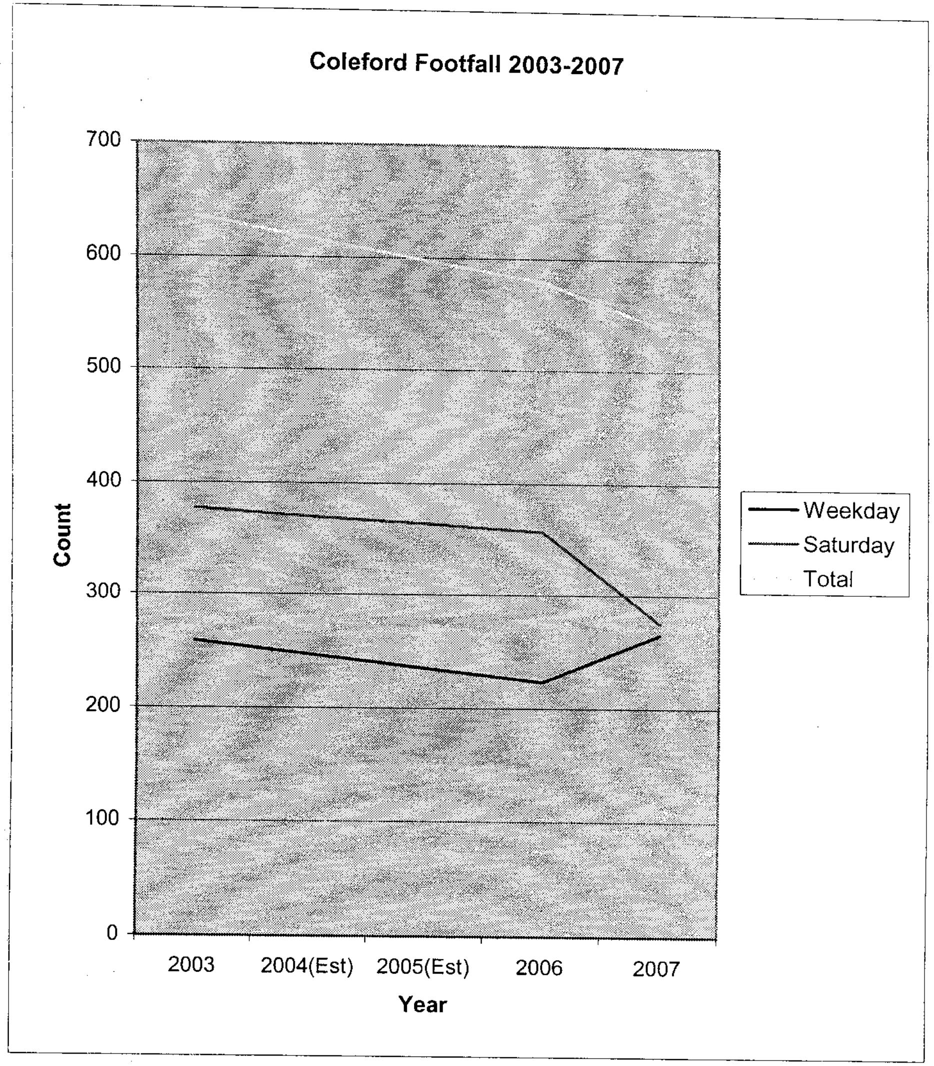
	Coleford		
	Weekday	Saturday	Total
2003	259	377	636
2004(Est)	247	370	617
2005(Est)	235	364	598
2006	223	357	580
2007	265	275	540
2007- AM	145	172	317
2007- PM	117	103	220

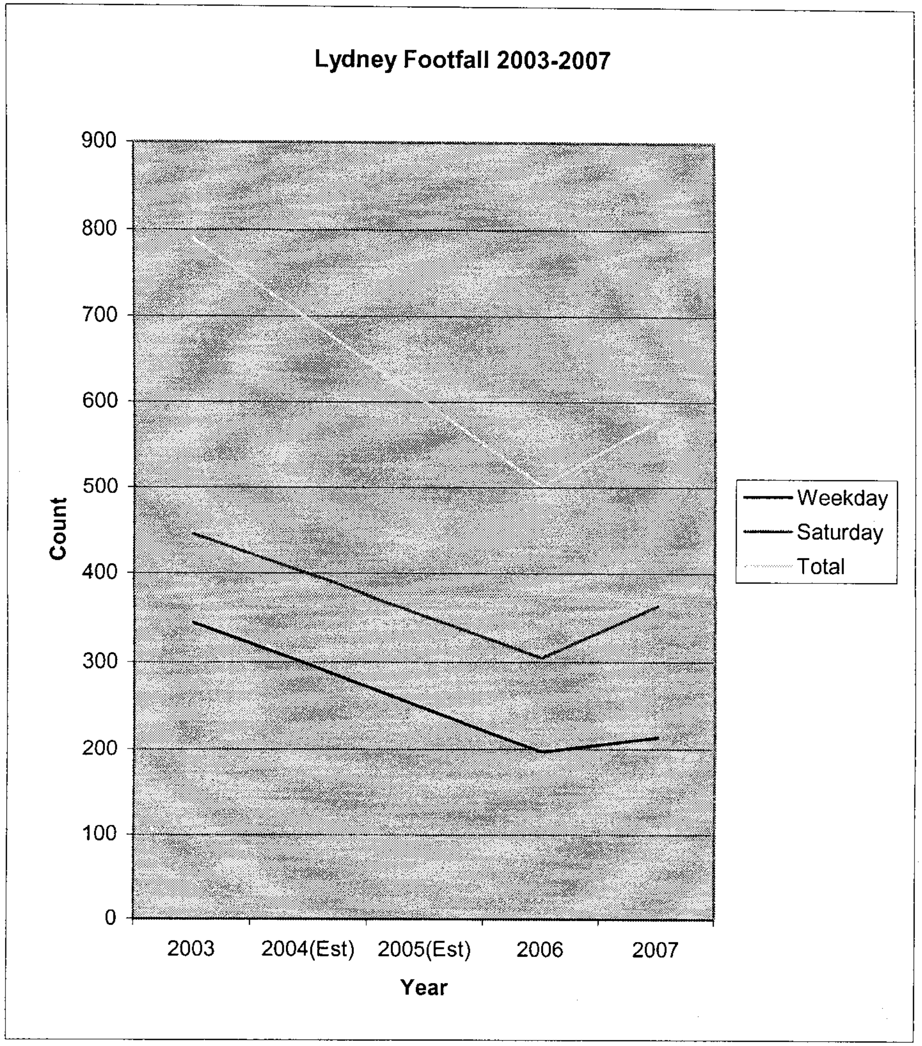
	Lydney		
	Weekday	Saturday	Total
2003	345	445	790
2004(Est)	297	399	696
2005(Est)	247	352	599
2006	197	305	502
2007	214	364	578
2007- AM	105	200	305
2007- PM	109	164	273

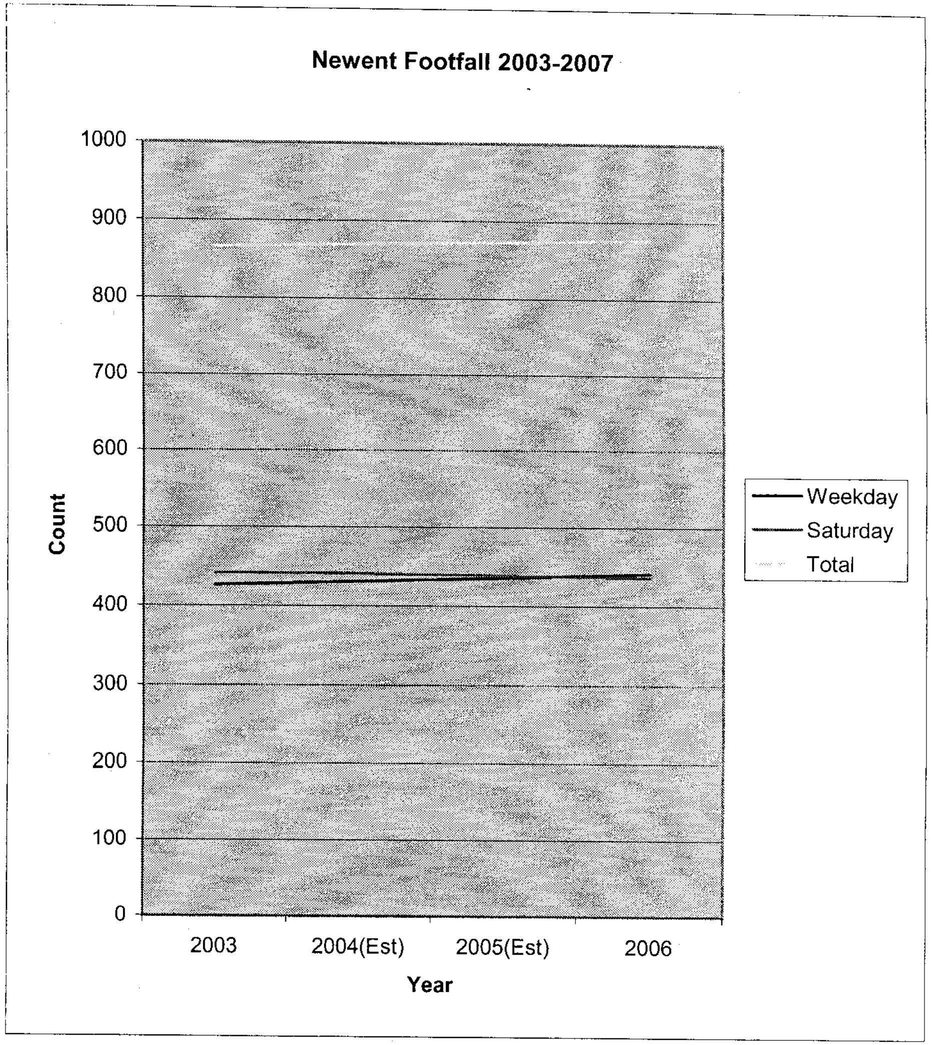
	Newent		
	Weekday	Saturday	Total
2003	425	441	866
2004(Est)	430	440	870
2005(Est)	435	438	873
2006	441	436	877
2007	485	426	911
2007- AM	265	283	548
2007- PM	220	143	363

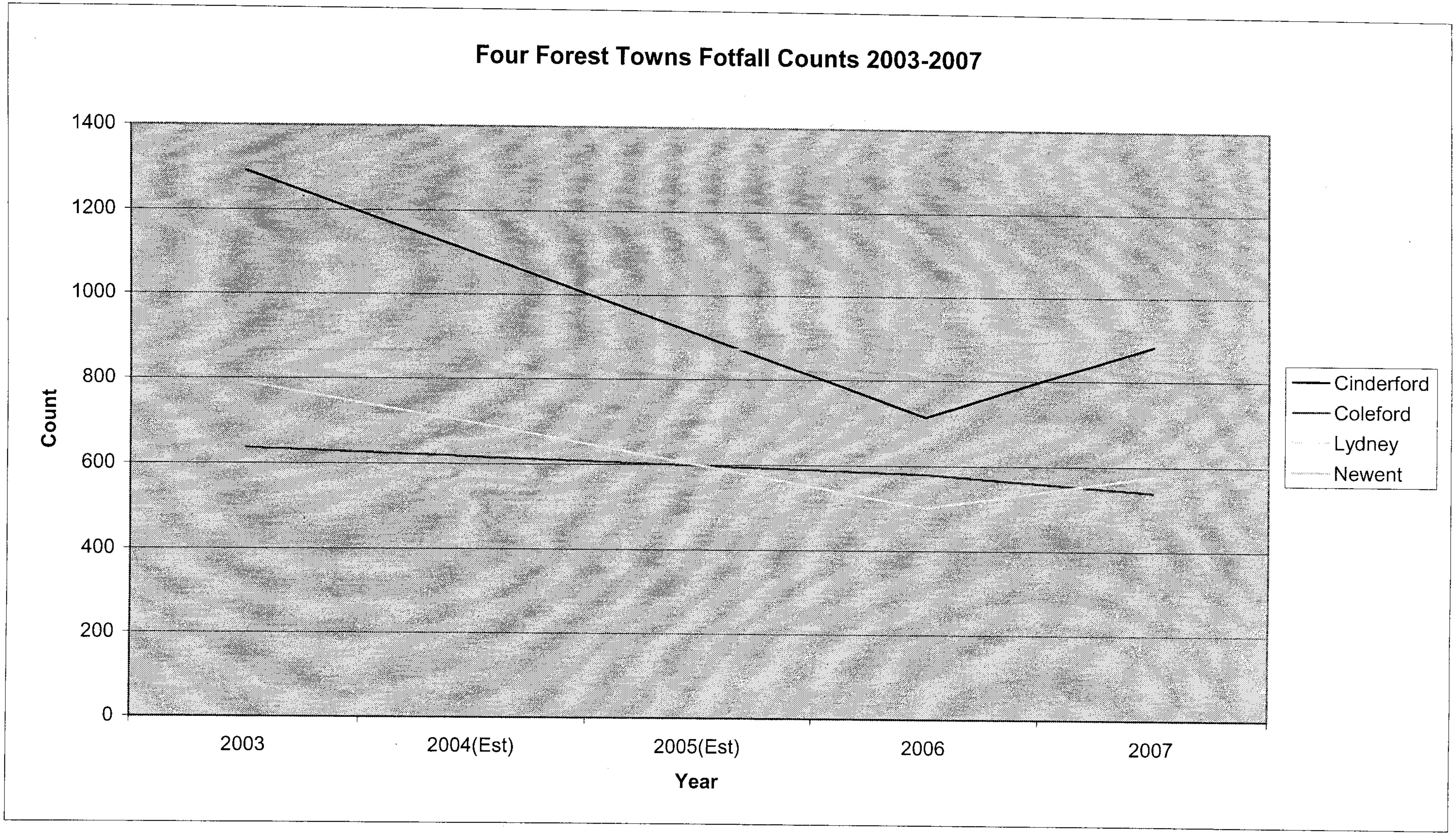
	Four Towns Totals			
	Cinderford	Coleford	Lydney	Newent
2003	1293	636	790	866
2004(Est)	1100	617	696	870
2005(Est)	907	598	599	873
2006	714	580	502	877
2007	884	540	578	911


Cinderford Footfall 2003-2007
1400
1200
1000
800
600
400
200
0
Count
2003
2004(Est)
2005(Est)
2006
2007
Year
Weekday
Saturday
Combined


Coleford Footfall 2003-2007
700
600
500
400
300
200
100
0
Count
2003
2004(Est)
2005(Est)
2006
2007
Year
Weekday
Saturday
Total


Lydney Footfall 2003-2007
Count
900
800
700
600
500
400
300
200
100
0
2003
2004(Est)
2005(Est)
2006
2007
Year
Weekday
Saturday
Total


Newent Footfall 2003-2007
Count
1000
900
800
700
600
500
400
300
200
100
0
2003
2004(Est)
2005(Est)
2006
Year
Weekday
Saturday
Total


Four Forest Towns Fotfall Counts 2003-2007
Count
1400
1200
1000
800
600
400
200
0
2003
2004(Est)
2005(Est)
2006
2007
Year
Cinderford
Coleford
Lydney
Newent

Appendix D

Quantitative Need Assessment Tables

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 1: POPULATION OF STUDY AREA, BY SURVEY ZONE (2007-2021)

ZONE	POSTCODE SECTORS	YEAR				Change, 2007-12		Change, 2007-16	
		2007	2012	2016	2021	No.	(%)	No.	(%)
1 LYDNEY	GL15 4 GL15 5 GL15 6								
	TOTAL	21039	22589	23829	25379	1550	7.4	2790	13.3
2 COLEFORD	GL16 7 GL16 8								
	TOTAL	13154	13619	13991	14456	465	3.5	837	6.4
3 CINDERFORD	GL14 2 GL14 3								
	TOTAL	11718	12183	12555	13020	465	4.0	837	7.1
4 NORTH OF CINDERFORD	GL17 0 GL17 9								
	TOTAL	11352	11507	11631	11786	155	1.4	279	2.5
5 CHEPSTOW/ MONMOUTH	NP16 5 / 6 / 7 NP25 3 / 4 / 5								
	TOTAL	36760	38020	39180	40524	1260	3.4	2420	6.6
6 ROSS-ON-WYE	HR9 5 HR9 6 HR9 7								
	TOTAL	20526	20766	20973	21221	240	1.2	447	2.2
7 WEST OF GLOUCESTER	GL14 1 GL2 3 / 8								
	TOTAL	8782	8937	9061	9216	155	1.8	279	3.2
8 NEWENT	GL18 1 GL18 2 GL19 3 GL19 4								
	TOTAL	16698	17008	17256	17566	310	1.9	558	3.3
TOTAL		**140029**	**144629**	**148476**	**153168**	**4600**	**3.3**	**8447**	**6.0**

Notes:

Population figures for each zone for 2007 derived from Experian Business Strategies Retail Planner Reports (dated March 2007). Data for Zones 5 & 6 for 2007-2021 taken directly from EBS data.

Growth for Zones 1, 2, 3, 4, 7 & 8 based on the following assumptions for population growth in Forest of Dean District:

Population growth per annum in Forest of Dean District 2007-2021 **310** (taken from Draft RSS Panel report house building projections)

Distribution of Growth (by zone)

	%	People
1	50	310
2	15	93
3	15	93
4	5	31
7	5	31
8	10	62
Total	**100**	**620**

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 2: PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2007-2012

A: CONVENIENCE GOODS

ZONE	2007	2012	2016	2021
1	1533	1603	1662	1738
2	1533	1603	1662	1738
3	1533	1603	1662	1738
4	1533	1603	1662	1738
5	1533	1603	1662	1738
6	1533	1603	1662	1738
7	1533	1603	1662	1738
8	1533	1603	1662	1738

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2007	2012	2016	2021
1	590	737	881	1102
2	590	737	881	1102
3	590	737	881	1102
4	590	737	881	1102
5	590	737	881	1102
6	590	737	881	1102
7	590	737	881	1102
8	590	737	881	1102

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2007	2012	2016	2021
1	342	392	440	508
2	342	392	440	508
3	342	392	440	508
4	342	392	440	508
5	342	392	440	508
6	342	392	440	508
7	342	392	440	508
8	342	392	440	508

D: DIY & DECORATING GOODS

ZONE	2007	2012	2016	2021
1	304	340	373	421
2	302	339	373	422
3	305	343	378	427
4	304	340	373	420
5	329	368	405	457
6	329	368	405	457
7	329	368	405	457
8	329	368	405	457

Notes:

Please refer to commentary overleaf

2004 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 2 (Continued): PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2007-2012

E: DOMESTIC APPLIANCES

ZONE	2007	2012	2016	2021
1	100	116	131	151
2	100	116	131	151
3	100	116	131	151
4	100	116	131	151
5	100	116	131	151
6	100	116	131	151
7	100	116	131	151
8	100	116	131	151

F: TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS

ZONE	2007	2012	2016	2021
1	323	451	595	849
2	323	451	595	849
3	323	451	595	849
4	323	451	595	849
5	323	451	595	849
6	323	451	595	849
7	323	451	595	849
8	323	451	595	849

G: PERSONAL & LUXURY GOODS

ZONE	2007	2012	2016	2021
1	547	628	703	810
2	547	628	703	810
3	547	628	703	810
4	547	628	703	810
5	547	628	703	810
6	547	628	703	810
7	547	628	703	810
8	547	628	703	810

H: RECREATIONAL GOODS

ZONE	2007	2012	2016	2021
1	463	569	674	838
2	463	569	674	838
3	463	569	674	838
4	463	569	674	838
5	463	569	674	838
6	463	569	674	838
7	463	569	674	838
8	463	569	674	838

Notes:

Please refer to commentary overleaf

2004 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

NOTES TO TABLE 2: PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2007-2012

Per capita expenditure estimates for convenience goods and individual comparison goods categories within each survey zone derived from Experian Business Strategies (EBS) Retail Planner Reports dated March 2007.

Per capita expenditure estimates for each goods category exclude an allowance for special forms of trading and are projected forward using data derived from Retail Planner Briefing Note 5.0'. In order to allow for growth in special forms of trading, the current levels of special forms of trading given in Retail Planning Briefing Note 5.0 have been doubled from present 'retail sale not in stores' levels.

Estimates for special forms of trading and projections for each goods category are contained in the table below:

Mid Devon Retail Study Goods Category	Constituent EBS Expenditure Categories	Allowance for Special Forms of Trading	Expenditure Projections (per annum)
Convenience Goods	Convenience Goods	4.0	0.9
Clothes & Footwear	Clothing	14.6	4.8
	Shoes	13.0	2.6
Furniture, Floorcoverings & Textiles	furniture and furnishings (90%)	6.6	2.1
	household textiles	18.0	4.7
DIY & Decorating	Materials for maintenance	6.2	1.1
	small tools	13.0	4.2
	major tools	13.0	4.2
	gardens, plants, etc	3.2	1.9
	furniture and furnishings (10%)	6.6	2.1
	non-durable household goods	8.6	2.3
Domestic Appliances	major household appliances	11.8	3.1
	appliances for personal care (10%)	2.8	3.1
	small appliances	11.8	2.2
TV, Hi-Fi & Radio	recording media	19.6	3.4
	audio-visual	21.8	8.5
Personal & Luxury	glassware	11.2	3.7
	medical goods	2.6	2.9
	therapeutic appliances	1.0	2.4
	appliances for personal care (90%)	2.8	3.1
	jewellery	14.8	0.1
	other personal effects	5.0	3.4
Recreational	bicycles	1.2	5.6
	games, toys, etc	14.2	5.4
	pets	3.2	1.9
	books	16.6	1.8

2004 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 3: TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2007-2012

A: CONVENIENCE GOODS

ZONE	2007	2012	2016	2021
1	32.3	36.2	39.6	44.1
2	20.2	21.8	23.2	25.1
3	18.0	19.5	20.9	22.6
4	17.4	18.4	19.3	20.5
5	56.4	61.0	65.1	70.4
6	31.5	33.3	34.9	36.9
7	13.5	14.3	15.1	16.0
8	25.6	27.3	28.7	30.5
TOTAL	**214.7**	**231.9**	**246.7**	**266.2**

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2007	2012	2016	2021
1	12.4	16.6	21.0	28.0
2	7.8	10.0	12.3	15.9
3	6.9	9.0	11.1	14.4
4	6.7	8.5	10.2	13.0
5	21.7	28.0	34.5	44.7
6	12.1	15.3	18.5	23.4
7	5.2	6.6	8.0	10.2
8	9.8	12.5	15.2	19.4
TOTAL	**82.6**	**106.6**	**130.8**	**168.9**

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2007	2012	2016	2021
1	7.2	8.9	10.5	12.9
2	4.5	5.3	6.1	7.3
3	4.0	4.8	5.5	6.6
4	3.9	4.5	5.1	6.0
5	12.6	14.9	17.2	20.6
6	7.0	8.1	9.2	7.3
7	3.0	3.5	4.0	4.7
8	5.7	6.7	7.6	8.9
TOTAL	**47.8**	**56.8**	**65.3**	**74.4**

D: DIY & DECORATING GOODS

ZONE	2007	2012	2016	2021
1	6.4	7.7	8.9	10.7
2	4.0	4.6	5.2	6.1
3	3.6	4.2	4.7	5.6
4	3.5	3.9	4.3	5.0
5	12.1	14.0	15.9	18.5
6	6.7	7.7	8.5	6.6
7	2.9	3.3	3.7	4.2
8	5.5	6.3	7.0	8.0
TOTAL	**44.6**	**51.6**	**58.2**	**64.7**

Notes:

Total expenditure for individual goods categories calculated by multiplying resident population by per capita expenditure.

2004 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 3 (Continued): TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2007-2012

E: DOMESTIC APPLIANCES

ZONE	2007	2012	2016	2021
1	2.1	2.6	3.1	3.8
2	1.3	1.6	1.8	2.2
3	1.2	1.4	1.6	2.0
4	1.1	1.3	1.5	1.8
5	3.7	4.4	5.1	6.1
6	2.1	2.4	2.7	3.2
7	0.9	1.0	1.2	1.4
8	1.7	2.0	2.3	2.7
TOTAL	**14.0**	**16.8**	**19.4**	**23.2**

F: TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS

ZONE	2007	2012	2016	2021
1	6.8	10.2	14.2	21.6
2	4.2	6.1	8.3	12.3
3	3.8	5.5	7.5	11.1
4	3.7	5.2	6.9	10.0
5	11.9	17.2	23.3	34.4
6	6.6	9.4	12.5	18.0
7	2.8	4.0	5.4	7.8
8	5.4	7.7	10.3	14.9
TOTAL	**45.2**	**65.2**	**88.4**	**130.1**

G: PERSONAL & LUXURY GOODS

ZONE	2007	2012	2016	2021
1	11.5	14.2	16.7	20.6
2	7.2	8.5	9.8	11.7
3	6.4	7.6	8.8	10.5
4	6.2	7.2	8.2	9.5
5	20.1	23.9	27.5	32.8
6	11.2	13.0	14.7	17.2
7	4.8	5.6	6.4	7.5
8	9.1	10.7	12.1	14.2
TOTAL	**76.5**	**90.8**	**104.3**	**124.1**

H: RECREATIONAL GOODS

ZONE	2007	2012	2016	2021
1	9.7	12.8	16.1	21.3
2	6.1	7.7	9.4	12.1
3	5.4	6.9	8.5	10.9
4	5.3	6.5	7.8	9.9
5	17.0	21.6	26.4	33.9
6	9.5	11.8	0.0	17.8
7	4.1	5.1	6.1	7.7
8	7.7	9.7	11.6	14.7
TOTAL	**64.8**	**82.3**	**85.9**	**128.3**

Notes:

Total expenditure for individual goods categories calculated by multiplying resident population by per capita expenditure.

2004 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 4: MARKET SHARE OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT

STORE / CENTRE	**1**		**2**		**3**		**4**		**5**		**6**		**7**		**8**	
	Main %	**Top-up %**	**Main %**	**Top-up %**	**Main %**	**Top-up %**	**Main %**	**Top-up %**	**Main %**	**Top-up %**	**Main %**	**Top-up %**	**Main %**	**Top-up %**	**Main %**	**Top-up %**
LYDNEY																
Town Centre																
Tesco	58.3	29.3	28.9	6.3	10.5	0.0	1.1	1.3	4.1	0.0	0.0	1.4	8.2	0.0	2.2	1.3
Somerfield	12.5	20.0	2.2	1.3	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	1.3
Co-op	7.3	18.7	0.0	2.5	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local stores	0.0	5.3	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
Sub-total	*78.1*	*73.3*	*31.1*	*10.1*	*10.5*	*0.0*	*2.2*	*2.6*	*4.1*	*0.0*	*0.0*	*1.4*	*9.2*	*0.0*	*2.2*	*2.6*
Cinderford																
Co-op	0.0	4.0	0.0	0.0	49.5	67.9	10.3	16.9	0.0	0.0	0.0	0.0	2.0	2.9	1.1	0.0
Lidl	1.0	0.0	4.4	1.3	8.4	9.9	6.9	3.9	1.0	0.0	1.1	0.0	0.0	1.4	0.0	0.0
Local stores	0.0	0.0	0.0	0.0	1.1	16.1	0.0	2.6	0.0	0.0	0.0	0.0	0.0	1.4	0.0	1.3
Sub-total	*1.0*	*4.0*	*4.4*	*1.3*	*59.0*	*93.9*	*17.2*	*23.4*	*1.0*	*0.0*	*1.1*	*0.0*	*2.0*	*5.7*	*1.1*	*1.3*
COLEFORD																
Town Centre																
Co-op	1.0	0.0	22.2	36.3	0.0	0.0	2.3	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0
Somerfield	0.0	1.3	18.9	13.8	0.0	1.2	1.1	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express	0.0	0.0	2.2	12.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local stores	0.0	0.0	0.0	13.8	0.0	0.0	1.1	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	*1.0*	*1.3*	*43.3*	*76.4*	*0.0*	*1.2*	*4.5*	*3.9*	*0.0*	*1.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*
NEWENT																
Town Centre																
Budgens	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.1	0.0	3.1	4.3	19.4	46.8
Co-op	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	2.6
Local stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	1.4	0.0	1.4	10.8	27.3
Sub-total	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*1.3*	*0.0*	*0.0*	*3.3*	*1.4*	*3.1*	*5.7*	*30.2*	*76.7*
Local stores																
Co-op, Mitcheldean	0.0	0.0	0.0	0.0	0.0	0.0	3.4	6.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mitcheldean (other)	0.0	0.0	0.0	0.0	0.0	0.0	1.1	22.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0
Newnham-on-Severn	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	1.0	11.4	0.0	0.0
Drybrook	0.0	0.0	0.0	0.0	0.0	0.0	1.1	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ruardean	0.0	0.0	0.0	0.0	0.0	0.0	1.1	7.8	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.0
Bream	0.0	10.7	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
Yorkley	0.0	2.7	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
Longhope	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.2	0.0	0.0	0.0	0.0	0.0	1.4	0.0	1.3
Redbrook	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0
Whitecroft	0.0	4.0	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
Lydbrook	0.0	0.0	0.0	1.3	0.0	0.0	0.0	5.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Hartpury	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	5.7	0.0	0.0
Newland	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	4.3	0.0	0.0
Alvington	0.0	1.3	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
Dymock	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	1.3
Milkwall	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Littledean	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Blaisdon	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	0.0
Sub-total	*0.0*	*18.7*	*0.0*	*2.6*	*0.0*	*2.4*	*6.7*	*52.0*	*0.0*	*3.8*	*0.0*	*0.0*	*1.0*	*27.1*	*0.0*	*2.6*
Outside District	19.9	2.7	21.2	9.6	30.5	2.5	69.4	16.8	94.9	94.9	95.6	97.2	84.7	61.5	66.5	16.8
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:

Market shares for main and top-up convenience shopping taken from questions 1 & 7 of the Forest of Dean Household Telephone Survey, excluding 'don't do', 'don't know, 'varies' and internet shopping trips.

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TABLE 5: TURNOVER OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT, 2007

STORE / CENTRE	1		2		3		4		5		6		7		8		STUDY AREA DERIVED TURNOVER (£m)
	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	Main (£m)	Top-up (£m)	
Available Convenience Expenditure	22.6	9.7	14.1	6.0	12.6	5.4	12.2	5.2	39.4	16.9	22.0	9.4	9.4	4.0	17.9	7.7	
LYDNEY																	
Town Centre																	
Tesco	13.2	2.8	4.1	0.4	1.3	0.0	0.1	0.1	1.6	0.0	0.0	0.1	0.8	0.0	0.4	0.1	25.0
Somerfield	2.8	1.9	0.3	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	5.5
Co-op	1.6	1.8	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7
Local stores	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	0.0	0.0	0.0	0.5
Sub-total	*17.6*	*7.1*	*4.4*	*0.6*	*1.3*	*0.0*	*0.3*	*0.1*	*1.6*	*0.0*	*0.0*	*0.1*	*0.9*	*0.0*	*0.4*	*0.2*	*34.7*
Cinderford																	
Co-op	0.0	0.4	0.0	0.0	6.2	3.7	1.3	0.9	0.0	0.0	0.0	0.0	0.2	0.1	0.2	0.0	12.9
Lidl	0.2	0.0	0.6	0.1	1.1	0.5	0.8	0.2	0.4	0.0	0.2	0.0	0.0	0.1	0.0	0.0	4.3
Local stores	0.0	0.0	0.0	0.0	0.1	0.9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	1.3
Sub-total	*0.2*	*0.4*	*0.6*	*0.1*	*7.4*	*5.1*	*2.1*	*1.2*	*0.4*	*0.0*	*0.2*	*0.0*	*0.2*	*0.2*	*0.2*	*0.1*	*18.5*
COLEFORD																	
Town Centre																	
Co-op	0.2	0.0	3.1	2.2	0.0	0.0	0.3	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	6.1
Somerfield	0.0	0.1	2.7	0.8	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.0
Tesco Express	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	0.0	0.0	1.1
Local stores	0.0	0.0	0.0	0.8	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Sub-total	*0.2*	*0.1*	*6.1*	*4.6*	*0.0*	*0.1*	*0.5*	*0.2*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*12.1*
NEWENT																	
Town Centre																	
Budgens	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.3	0.2	3.5	3.6	7.8
Co-op	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	0.2	0.2
Local stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.1	0.0	0.1	1.9	2.1	4.7
Sub-total	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.1*	*0.0*	*0.0*	*0.7*	*0.1*	*0.3*	*0.2*	*5.4*	*5.9*	*12.8*
Local stores																	
Co-op, Mitcheldean	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Mitcheldean (other)	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.3
Newnham-on-Severn	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.5	0.0	0.0	0.6
Drybrook	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
Ruardean	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.7
Bream	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Yorkley	0.0	0.3	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	0.5
Longhope	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.4
Redbrook	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	0.4
Whitecroft	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Lydbrook	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Hartpury	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	0.2	0.0	0.0	0.2
Newland	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	0.2	0.0	0.0	0.2
Alvington	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	0.0	0.0	0.0	0.1
Dymock	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	0.1
Milkwall	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	0.0	0.1
Littledean	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	0.1
Blaisdon	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	0.1
Sub-total	*0.0*	*1.8*	*0.0*	*0.2*	*0.0*	*0.1*	*0.8*	*2.7*	*0.0*	*0.6*	*0.0*	*0.0*	*0.1*	*1.1*	*0.0*	*0.2*	*7.7*
Outside District	4.5	0.3	3.0	0.6	3.8	0.1	8.5	0.9	37.4	16.0	21.1	9.2	8.0	2.5	11.9	1.3	129.0
TOTAL	**22.6**	**9.7**	**14.1**	**6.0**	**12.6**	**5.4**	**12.2**	**5.2**	**39.4**	**16.9**	**22.0**	**9.4**	**9.4**	**4.0**	**17.9**	**7.7**	**214.7**

Notes:

Turnover of convenience facilities calculated by applying current market share of main and top-up shopping trips to available convenience goods expenditure by zone.

Proportion of expenditure flowing to main and top-up food shopping destinations derived from Question 6 of the Forest of Dean Household Telephone Survey and summarised below:

Zone	Main %	Top-up %
1	70	30
2	70	30
3	70	30
4	70	30
5	70	30
6	70	30
7	70	30
8	70	30
9	70	30
10	70	30
11	70	30

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TABLE 6: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	0.0	0.0	11.1	3.7	0.0	0.0	1.2	0.0		0.0	0.0	0.8	0.2	0.0	0.0	0.1	0.0	1.1
Lydney	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Coleford	0.0	3.7	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.3
Newent	0.0	0.0	0.0	0.0	0.0	1.1	0.0	4.5		0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.4	0.6
Other Destinations	92.9	96.3	88.9	96.3	100.0	98.9	98.8	95.5		11.5	7.5	6.1	6.4	21.7	12.0	5.1	9.4	79.8
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		12.4	7.8	6.9	6.7	21.7	12.1	5.2	9.8	82.6

Notes:

Market shares for clothes and footwear facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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TABLE 7: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	0.0	0.0	13.2	6.1	0.0	1.7	1.6	0.0		0.0	0.0	0.5	0.2	0.0	0.1	0.0	0.0	0.9
Lydney	11.1	1.5	0.0	0.0	0.0	0.0	0.0	0.0		0.8	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Coleford	6.9	20.9	5.3	4.5	1.4	0.0	0.0	1.5		0.5	0.9	0.2	0.2	0.2	0.0	0.0	0.1	2.1
Newent	0.0	0.0	0.0	0.0	0.0	1.7	0.0	6.1		0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.3	0.5
Other Destinations	82.0	77.6	81.5	89.4	98.6	96.6	98.4	92.4		5.9	3.5	3.3	3.5	12.4	6.8	3.0	5.3	43.5
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		7.2	4.5	4.0	3.9	12.6	7.0	3.0	5.7	47.8

Notes:

Market shares for furniture, floorcovering and textile facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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TABLE 8: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	0.0	0.0	33.3	9.6	0.0	0.0	6.3	0.0		0.0	0.0	1.2	0.3	0.0	0.0	0.2	0.0	1.7
Lydney	24.4	0.0	0.0	0.0	0.0	0.0	1.2	0.0		1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6
Coleford	4.9	17.3	1.1	0.0	1.2	0.0	0.0	0.0		0.3	0.7	0.0	0.0	0.1	0.0	0.0	0.0	1.2
Newent	0.0	0.0	0.0	0.0	0.0	3.8	1.2	25.3		0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.4	1.7
Other Destinations	70.7	82.7	65.6	90.4	98.8	96.2	91.3	74.7		4.5	3.3	2.3	3.1	11.9	6.5	2.6	4.1	38.4
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**6.4**	**4.0**	**3.6**	**3.5**	**12.1**	**6.7**	**2.9**	**5.5**	**44.6**

Notes:

Market shares for DIY facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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TABLE 9: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	2.6	0.0	44.6	13.0	1.4	0.0	3.9	1.2		0.1	0.0	0.5	0.1	0.1	0.0	0.0	0.0	0.8
Lydney	34.2	3.9	3.6	0.0	2.8	1.3	0.0	0.0		0.7	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.9
Coleford	10.5	40.8	1.2	11.6	0.0	0.0	0.0	0.0		0.2	0.5	0.0	0.1	0.0	0.0	0.0	0.0	0.9
Newent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Other Destinations	52.7	55.3	50.6	75.4	95.8	98.7	96.1	95.2		1.1	0.7	0.6	0.9	3.5	2.0	0.8	1.6	11.3
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**2.1**	**1.3**	**1.2**	**1.1**	**3.7**	**2.1**	**0.9**	**1.7**	**14.0**

Notes:

Market shares for domestic appliance facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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TABLE 10: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	0.0	1.5	27.7	7.3	1.5	0.0	0.0	0.0		0.0	0.1	1.0	0.3	0.2	0.0	0.0	0.0	1.6
Lydney	37.7	3.1	6.0	0.0	1.5	0.0	3.3	0.0		2.6	0.1	0.2	0.0	0.2	0.0	0.1	0.0	3.2
Coleford	0.0	9.2	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	0.4
Newent	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
Other Destinations	62.3	86.2	66.3	92.7	97.0	100.0	96.7	100.0		4.2	3.7	2.5	3.4	11.5	6.6	2.7	5.4	40.0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		6.8	4.2	3.8	3.7	11.9	6.6	2.8	5.4	45.2

Notes:

Market shares for electrical goods facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 11: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	0.0	0.0	32.1	7.2	0.0	0.0	2.9	0.0		0.0	0.0	2.1	0.4	0.0	0.0	0.1	0.0	2.6
Lydney	31.3	0.0	0.0	0.0	0.0	0.0	2.9	0.0		3.6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	3.7
Coleford	1.5	20.6	0.0	1.4	0.0	0.0	0.0	0.0		0.2	1.5	0.0	0.1	0.0	0.0	0.0	0.0	1.7
Newent	0.0	0.0	0.0	0.0	0.0	1.4	2.9	20.8		0.0	0.0	0.0	0.0	0.0	0.2	0.1	1.9	2.2
Other Destinations	67.2	79.4	67.9	91.4	100.0	98.6	91.3	79.2		7.7	5.7	4.3	5.7	20.1	11.1	4.4	7.2	66.2
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**11.5**	**7.2**	**6.4**	**6.2**	**20.1**	**11.2**	**4.8**	**9.1**	**76.5**

Notes:

Market shares for personal and luxury goods facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 12: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER (£m)
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	
Cinderford	0.0	2.2	12.5	2.6	2.3	0.0	0.0	0.0		0.0	0.1	0.7	0.1	0.4	0.0	0.0	0.0	1.3
Lydney	18.2	2.2	0.0	0.0	0.0	0.0	0.0	0.0		1.8	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.9
Coleford	0.0	2.2	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	0.1
Newent	2.3	0.0	0.0	0.0	0.0	0.0	0.0	2.4		0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.4
Other Destinations	79.5	93.4	87.5	97.4	97.7	100.0	100.0	97.6		7.7	5.7	4.7	5.1	16.6	9.5	4.1	7.5	61.0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**9.7**	**6.1**	**5.4**	**5.3**	**17.0**	**9.5**	**4.1**	**7.7**	**64.8**

Notes:

Market shares for recreational goods facilities within each zone taken from the Forest of Dean Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

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FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY

TABLE 13: TOTAL COMPARISON TURNOVER OF MAIN FOREST OF DEAN TOWN CENTRES, 2007

CENTRE	ZONE								TURNOVER (£m)	STUDY AREA MARKET SHARE (%)
	1	2	3	4	5	6	7	8		
Cinderford	0.1	0.2	6.8	1.8	0.6	0.1	0.5	0.0	10.1	2.7
Lydney	11.9	0.4	0.3	0.0	0.3	0.0	0.3	0.0	13.1	3.5
Coleford	1.2	4.5	0.3	0.4	0.3	0.0	0.0	0.1	6.7	1.8
Newent	0.2	0.0	0.0	0.0	0.0	0.7	0.2	4.3	5.4	1.4
TOTAL	**56.1**	**35.1**	**31.3**	**30.3**	**98.9**	**55.2**	**23.6**	**44.9**	**375.5**	**100.0**

Notes:

Turnovers, by zone, for comparison facilities within Cinderford, Coleford and Lydney taken from Tables 6-12.

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TABLE 14: BENCHMARK TURNOVER LEVELS OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT, 2007

STORE / CENTRE	TOTAL FLOORSPACE (sq m net)	% OF CONVENIENCE GOODS SALES	TOTAL CONVENIENCE GOODS FLOORSPACE	SALES DENSITY (£/sq m)	TOTAL BENCHMARK TURNOVER (£m)
LYDNEY					
Town Centre					
Tesco	1739	90	1565	12300	19.2
Somerfield	910	95	865	6853	5.9
Co-op	1677	80	1342	5600	7.5
Local stores	541	90	487	4000	1.9
Sub-total					*34.6*
Cinderford					
Co-op	1858	70	1301	5600	7.3
Lidl	1086	80	869	2700	2.3
Local stores	1014	90	913	4000	3.7
Sub-total					*13.3*
COLEFORD					
Town Centre					
Co-op	929	80	743	5600	4.2
Somerfield	474	95	450	6853	3.1
Tesco Express	167	95	159	12300	2.0
Local stores	678	90	610	4000	2.4
Sub-total					*11.6*
NEWENT					
Town Centre					
Budgens	615	95	584	7500	4.4
Co-op	196	95	186	5600	1.0
Local stores	1241	90	1117	4000	4.5
Sub-total					*9.9*

Notes:

Sales area information for named stores taken from IGD database. Floorspace for 'local stores' based on data from FODDC.

Conversion to convenience goods sales area based on observations by GVA Grimley during site visits November 2007.

Sales density information reflects convenience goods benchmark turnovers of individual operators, based on data from Retail Rankings 2007 Edition and Verdict research.
Sales densities for 'local stores' based on experience elsewhere in South West.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2007-2021

A: Lydney

	2007	2012	2016	2021
Available Convenience Goods Expenditure (£m)	214.7	231.9	246.7	266.2
Turnover from Study Area (£m)	34.7	37.3	39.7	42.9
Market Share (%)	16.1	16.1	16.1	16.1
Expenditure Inflow (£m)	1.3	1.4	1.5	1.6
Total Turnover Potential (£m)	35.9	38.7	41.2	44.4
Baseline Turnover of Existing Facilities (£m)	34.6	35.7	36.6	37.7
Residual Expenditure (£m)	**1.3**	**3.0**	**4.6**	**6.8**
Potential Sales Density for future convenience stores (£/sq m)	10,000	10304	10553	10874
Potential Floorspace Capacity (sq m)	**131**	**294**	**440**	**624**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 3.7% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover from existing facilities taken from Table 14, assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new convenience goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2007-2021

B: Cinderford

	2007	2012	2016	2021
Available Convenience Goods Expenditure (£m)	214.7	231.9	246.7	266.2
Turnover from Study Area (£m)	18.5	19.9	21.2	22.9
Market Share (%)	8.6	8.6	8.6	8.6
Expenditure Inflow (£m)	1.3	1.4	1.5	1.6
Total Turnover Potential (£m)	19.8	21.3	22.7	24.5
Baseline Turnover of Existing Facilities (£m)	13.3	13.7	14.0	14.4
Residual Expenditure (£m)	**6.5**	**7.7**	**8.7**	**10.1**
Potential Sales Density for future convenience stores (£/sq m)	10,000	10304	10553	10874
Potential Floorspace Capacity (sq m)	**647**	**743**	**823**	**925**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 7% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover from existing facilities taken from Table 14, assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new convenience goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2007-2021

C: Coleford

	2007	2012	2016	2021
Available Convenience Goods Expenditure (£m)	214.7	231.9	246.7	266.2
Turnover from Study Area (£m)	12.1	13.1	13.9	15.0
Market Share (%)	5.6	5.6	5.6	5.6
Expenditure Inflow (£m)	1.3	1.4	1.5	1.7
Total Turnover Potential (£m)	13.5	14.5	15.5	16.7
Baseline Turnover of Existing Facilities (£m)	11.6	12.0	12.3	12.7
Residual Expenditure (£m)	**1.8**	**2.5**	**3.2**	**4.0**
Potential Sales Density for future convenience stores (£/sq m)	10,000	10304	10553	10874
Potential Floorspace Capacity (sq m)	**182**	**247**	**302**	**370**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 11% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover from existing facilities taken from Table 14, assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new convenience goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2007-2021

D: Newent

	2007	2012	2016	2021
Available Convenience Goods Expenditure (£m)	214.7	231.9	246.7	266.2
Turnover from Study Area (£m)	12.8	13.8	14.7	15.8
Market Share (%)	5.9	5.9	5.9	5.9
Expenditure Inflow (£m)	1.3	1.4	1.5	1.6
Total Turnover Potential (£m)	14.0	15.2	16.1	17.4
Baseline Turnover of Existing Facilities (£m)	9.9	10.2	10.4	10.8
Residual Expenditure (£m)	**4.1**	**5.0**	**5.7**	**6.6**
Potential Sales Density for future convenience stores (£/sq m)	10,000	10304	10553	10874
Potential Floorspace Capacity (sq m)	**414**	**481**	**539**	**610**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 10% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover from existing facilities taken from Table 14, assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new convenience goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 0.6% per annum over 2007-2021.

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TABLE 16: COMPARISON GOODS CAPACITY 2007-2021

A: Lydney

	2007	2012	2016	2021
Available Comparison Goods Expenditure (£m)	375.5	470.0	552.2	713.5
Turnover from Study Area (£m)	13.1	15.6	18.3	23.7
Market Share (%)	3.5	3.3	3.3	3.3
Expenditure Inflow (£m)	2.2	2.8	3.3	4.2
Total Turnover Potential (£m)	15.3	18.4	21.6	27.9
Baseline Turnover of Existing Facilities (£m)	15.3	17.1	18.7	20.8
Residual Expenditure (£m)	**0.0**	**1.3**	**3.0**	**7.1**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5575	6082	6781
Potential Floorspace Capacity (sq m)	**0**	**232**	**488**	**1,044**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 17% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2007 is assumed to match total turnover potential at 2007 and assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new comparison goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021.

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TABLE 16: COMPARISON GOODS CAPACITY 2007-2021

B: Cinderford

	2007	2012	2016	2021
Available Comparison Goods Expenditure (£m)	375.5	470.0	552.2	713.5
Turnover from Study Area (£m)	10.1	17.3	20.3	26.3
Market Share (%)	2.7	3.7	3.7	3.7
Expenditure Inflow (£m)	2.2	2.8	3.3	4.2
Total Turnover Potential (£m)	12.3	20.1	23.6	30.5
Baseline Turnover of Existing Facilities (£m)	12.3	13.7	15.0	16.7
Commitments (£m)	4.6	5.2	5.6	6.3
Residual Expenditure (£m)	**-4.6**	**1.2**	**3.0**	**7.5**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5575	6082	6781
Potential Floorspace Capacity (sq m)	**-925**	**220**	**499**	**1,107**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 22% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2007 is assumed to match total turnover potential at 2007 and assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new comparison goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021.

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TABLE 16: COMPARISON GOODS CAPACITY 2007-2021

C: Coleford

	2007	2012	2016	2021
Available Comparison Goods Expenditure (£m)	375.5	470.0	552.2	713.5
Turnover from Study Area (£m)	6.7	8.1	9.6	12.3
Market Share (%)	1.8	1.7	1.7	1.7
Expenditure Inflow (£m)	2.2	2.8	3.3	4.2
Total Turnover Potential (£m)	8.9	10.9	12.9	16.5
Baseline Turnover of Existing Facilities (£m)	8.9	10.0	10.9	12.1
Residual Expenditure (£m)	**0.0**	**1.0**	**2.0**	**4.4**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5575	6082	6781
Potential Floorspace Capacity (sq m)	**0**	**173**	**326**	**652**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 33% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2007 is assumed to match total turnover potential at 2007 and assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new comparison goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021.

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TABLE 16: COMPARISON GOODS CAPACITY 2007-2021

D: Newent

	2007	2012	2016	2021
Available Comparison Goods Expenditure (£m)	375.5	470.0	552.2	713.5
Turnover from Study Area (£m)	5.4	6.7	7.9	10.2
Market Share (%)	1.4	1.4	1.4	1.4
Expenditure Inflow (£m)	2.2	2.8	3.2	4.2
Total Turnover Potential (£m)	7.6	9.5	11.2	14.4
Baseline Turnover of Existing Facilities (£m)	7.6	8.5	9.2	10.3
Residual Expenditure (£m)	**0.0**	**1.0**	**1.9**	**4.1**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5575	6082	6781
Potential Floorspace Capacity (sq m)	**0**	**186**	**318**	**609**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2007 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2021 is assumed to remain constant.
Expenditure inflow is assumed to be 41% of study area derived expenditure.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2007 is assumed to match total turnover potential at 2007 and assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021
Residual expenditure is the total turnover potential minus the turnover of existing facilities.
Potential sales density of new comparison goods floorspace is indicative only and is assumed to experience an increase in floorspace efficiency of 2.2% per annum over 2007-2021.

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