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Forest of Dean Retail Study Update 2011

Forest of Dean District Council

March 2011

Prepared By . ... Status . ... Date ....

Reviewed By .... Status . ... Date ....

For and on behalf of GVA Grimley Ltd

CONTENTS

Appendices

1. Introduction

Scope and purpose

1.1 This report has been prepared by GVA in response to an instruction by Forest of Dean District Council ('FODDC'), dated February 2011, to prepare an update to the 2008 Forest of Dean Retail Study (also prepared by GVA) (hereafter referred to as 'the 2008 Study'). The 2008 Study was prepared to provide essential background information and evidence to assist FODDC in the production of its Local Development Framework ('LDF'), particularly the Core Strategy.

1.2 In particular, the 2008 Study provided detailed evidence in relation to the (quantitative and qualitative) need for additional retail floorspace, the adequacy of existing retail floorspace, the health of the four town centres in the District, information on shopping patterns associated with different types of food and non-food retail floorspace and the identification of sites for new retail development.

1.3 Since the completion of the 2008 Study there have been a number of changes in the evidence base which informs the assessment of quantitative need for additional retail floorspace, including updated population growth forecasts, changes to the forecast growth in retail expenditure and retail floorspace efficiency and published average trading performance levels of grocery store operators. There are also a small number of retail commitments in Coleford and Cinderford. Therefore, in order to provide an up-to-date evidence base for FODDC's Core Strategy as it moves forward towards submission to the Secretary of State later this year, FODDC have instructed GVA to update the quantitative need forecasts for retail floorspace within the four main settlements across the District.

1.4 Having regard to the relationship of this update assessment to the 2008 Study, this document is intended to supersede those parts of Chapter 5 which provide baseline quantitative retail floorspace capacity predictions and those parts of Chapter 6 which translate the results of the policy options analysis into a range of floorspace capacity predictions for the four main towns in the District. The assessment of town centre health in Chapter 4, the qualitative need assessment in Chapter 5 and assessment of potential retail development sites in Chapter 6 remain unaffected.

Policy changes since the 2008 Study

1.5 Since the completion of the 2008 Study, there have been a small number of important changes in the prevailing policy context. Most importantly, the Government published Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4') in December 2009. PPS4 replaces, amongst other things, PPS6 (2005) which was in force at the time of preparing the 2008 Study. PPS4 was accompanied by Practice Guidance on need, impact and the sequential approach, also published in December 2009.

1.6 For plan-making purposes, PPS4 retains the requirement to assess the need for additional retail floorspace although it removed the precedence given to quantitative aspects of need, now placing quantitative and qualitative need on a equal footing. PPS4 also notes that, in derived areas which lack access to a range of services and facilities, additional weight should be given to meeting qualitative deficiencies.

1.7 The overall structure of PPS4 has moved towards a more concise set of policies, split into two parts: plan making policies and development management policies. Within the plan making section, there are policies on planning for centres (EC3) and the sequential approach to site selection (EC5) which broadly update long-established guidance in PPS6. However, there is also a new policy (EC4) on planning for consumer choice and promoting competitive town centres.

1.8 The key headline change between PPS6 and PPS4 is the removal of the need test from development management decisions and the overall reorganisation of the previous five national policy tests (need, scale, sequential approach, retail impact and accessibility) into two tests: sequential approach and impact[1]. Planning applications for retail uses outside of town centres and not in accordance with the development plan will be subject to policies EC14-17 of PPS4. Beyond the general introduction provided by Policy EC14, EC15 outlines the consideration of sequential assessments, EC16 outlines the impact tests which proposals should be assessed against, whilst EC17 provides clear guidance on the determination of planning applications for development of retail uses not in a centre and not in accordance with an up to date development plan:

- Planning permission should be refused where the applicant has not demonstrated compliance with the requirements of the sequential approach, or there is clear evidence that the proposal is likely to lead to significant adverse impacts in terms of any one of the impact tests at EC16 and EC10.
- Where no significant adverse impacts have been identified, and the proposal complies with the sequential approach, EC17 directs planning applications should be determined by taking account of the positive and negative impacts of the proposal, other material considerations and the likely cumulative effect of recent permissions, developments under construction and completed developments.

1.9 In addition to the changes at the national level, the incoming Coalition Government has signalled its intension not to proceed with the draft Regional Spatial Strategy ('RSS'), with Regional Strategies intended to be removed once the Localism Bill becomes law. Whilst this will remove a tier from the development plan, the RSS's evidence base remains and the FODDC Core Strategy makes extensive use of this evidence although it does not depend on the RSS itself.

The structure of this report

1.10 In the next section of this report, we provide an updated analysis of the quantitative need for additional food and non-food retail floorspace in Forest of Dean District, outlining the updated data sources and assumptions which have been used, along with an updated set of retail floorspace capacity forecasts based upon (and influenced by) the guiding principles of our previous policy options analysis.

1.11 All statistical information and other plans referred to in the text of this document are contained in appendices which can be found at the rear of this document.

[1] Whilst the test of 'need' has been removed, the PPS6 tests of scale and accessibility have been subsumed into the new impact test.

2. Updated Quantitative Need Assessment

Introduction

2.1 This section provides an updated assessment of the quantitative need for additional food and non-food retail floorspace within the four main towns in Forest of Dean District. As such, it supersedes the baseline quantitative need forecasts provided within paragraphs 5.5 to 5.31 of the 2008 Study plus the capacity forecasts influenced by the policy options analysis contained in Section 6, particularly paragraphs 6.28 to 6.48 and Tables Q & R. It also provides an updated set of quantitative assessment tables to replace those in Appendix D of the 2008 Study.

2.2 The assessment of qualitative need for additional retail floorspace provision has not been revisited and remains as per the 2008 Study report.

2.3 This section is structured to firstly outline the updated data sources which have used in the update assessment, followed by an updated assessment for each of the four towns in the District.

Methodology and data sources

2.4 The step by step methodology and assumptions/data sources outlined at paragraphs 5.6 and 5.7 of the 2008 Study remain the overall basis for assessing quantitative need for additional retail floorspace. However, the following updates have been incorporated in this latest assessment:

- **Population data**. Within the 2008 Study, population data informing the draft RSS was utilised. Further population growth forecasts for Forest of Dean District have now been published by Gloucestershire County Council and have been incorporated into this latest assessment. Like the 2008 Study, the global forecast population growth for Forest of Dean District has been sub-divided into the various survey zones covering its administrative area with reference to the scale and location of housebuilding planned by CSP.5 in the February 2011 version of the Core Strategy.
- **Per capita retail expenditure**. Like the 2008 Study, base data on per capita retail expenditure on convenience (food) and comparison (non-food) items has been

obtained from Experian. The latest data is 2009 spending levels expressed in a 2009 price base. In relation to future forecasts, GVA has considered the latest information provided by Experian and we based adopted an annual increase of 0.6% for convenience shopping and an annual increase of 3.3% for comparison goods shopping over the period 2011-2026.

- **Floorspace efficiency**. Our previous quantitative assessment allowed for increases in floorspace efficiency for both convenience and comparison retail floorspace over the assessment. This approach has been continued for this update assessment and an allowance of 0.2% per annum for convenience goods floorspace and 1.6% per annum for comparison goods floorspace has been made.
- **Updated baseline turnover levels**. For our assessment of quantitative need for convenience goods floorspace, reference is made to company average sales density information. For the purposes of this update assessment, the company average sales density has been updated with reference to latest research by Verdict. For our comparison goods floorspace capacity exercise, reference has been made to the previous study's (2008) benchmark turnover levels updated to a new 2011 base.
- **Commitments**. In the 2008 Study, the DIY store commitment in Cinderford was taken into account. Since the completion of that study, this permission has been renewed and we take account of the latest turnover and trade diversion levels associated with this proposal. In addition, planning permission has recently been granted for a 300sq m net extension to the Co-op store in Coleford.

2.5 The study area for the quantitative assessment has remained the same as the 2008 Study and the study area is reproduced at Appendix A to this document for ease of reference. The 2008 Study used the results of a household survey conducted in 2007 as the basis for the quantitative assessment of retail need and the results of this survey continue to be used in the update assessment. Whilst this survey is now around four years old, little has changed in terms of the retail structure within the District and surrounding areas and therefore we consider that the existing survey can be used for this update assessment.

2.6 As already noted, the statistical assessment of quantitative need at Appendix D in the 2008 Study is replaced by our updated assessment which is contained at Appendix B to this report. The structure of these updated tables is very similar to the 2008 Study although the assessment has been subject to additional detailed analysis in order that the future market share of food and non-food shopping in each of the four towns is more reflective of housebuilding rates and population growth in each zone.

2.7 Within the 2008 Study, baseline capacity forecasts were provided in Section 5 which projected future capacity on the basis of a constant market share for each of the four towns. Section 6 of the 2008 Study report took this data forward and applied a range of forecast capacity levels based on the guidance provided by the policy options analysis.

2.8 For example, in relation to Cinderford the 2008 Study indicated that there was an opportunity to increase the market share of convenience shopping in the town via the provision of a new appropriately sized main/bulk food shopping destination. As a consequence, a range of capcity forecasts were provided for convenience shopping in Cinderford which ranged from a lower end of the range (based upon the constant market share scenario) to the higher end (based on a increase in the town's convenience shopping market share).

2.9 For the avoidance of doubt, the policy options analysis in the 2008 Study has not been revisted within this update assessment although the range of floorspace capacity forecasts which will result from the application of these options will change and this is recorded later in this section.

2.10 We deal with each of the four main towns in turn below, in terms of their forecast capacity for additional food and non-food floorspace.

Lydney

Convenience retail floorspace

2.11 The 2008 Study recommended that the Council did not make a significant intervention in the convenience retail sector in Lydney indicating that any potential increases in shopping trips retention in the local area would be cancelled out should new facilities in Coleford and Cinderford be provided.

2.12 The updated baseline (i.e. constant market share) capacity analysis for conveneince floorspace in Lydney is shown in Table 15a1 at Appendix B and takes into account the effect upon expenditure flowing to Lydney as a result of the recently committed extension to the Co-op store in Coleford. When compared to the 2008 Study, Table 15a1 shows a slightly increase in the amount of surplus capacity in Lydney at 2016 (being the first available comparable year), rising from 440sq m net in 2016 to 698sq m net. Assuming a constant market share (after the effects of the extended Co-op in Coleford), capacity will then grow to 845sq m net by 2021 and 1,002sq m net by 2026.

2.13 In line with the policy options analysis contained within the 2008 Study, we have also considered the implications of a rise in Lydney's market share (to 90% in its 'home zone', Zone 1) plus the implications of a loss of expenditure available to stores in Lydney should new facilities be provided in Coleford and Cinderford.

2.14 Should the market share of convenience shopping facilities in Zone 1 rise to 90%, with its attractiveness remaining the same in all other zones, then Lydney's floorspace capacity would rise to1,241sq m net in 2016, 1,411sq m net in 2021 and 1,591sq m net in 2026. this is shown in Table 15a2. However, should the rise in market share from Zone 1 residents be assessed alongside the loss of expenditure as a result of new convenience retail facilities in Coleford and Cinderford steming the flow of expenditure to Lydney (see Table 15a3), then Lydney's capacity falls back to 570sq m net in 2016, 714sq m net in 2021 and 860sq m net in 2026. The final scenario (see Table 15a4) which has been assessed is no change in Lydney's market share in Zone 1 plus the loss of expenditure currently flowing from Coleford and Cinderford. This would leave Lydney's convenience floorspace capacity at 108sq m net at 2016, rising to 232sq m net at 2021 and 359sq m net at 2026.

2.15 With the scenario in Table 15a2, excluding the potential for other towns such as Coleford and Cinderford to grow their convenience retail provisoin in line with observed qualitative needs, likely to be inappropriate we recommend that the convenience goods capacity for Lydney should be:

- Up to 570sq m net by 2016;
- Up to 714sq m net by 2021; and
- Up to 860sq m net by 2026.

Comparison retail floorspace

2.16 Turning to future comparison goods floorspace levels in Lydney, the previous study found capacity for 488sq m net by 2016, rising to 1,044sq m net by 2021 assuming a constant market share in the future. Adopting this same assumption, our updated capacity forecasts (at Table 16a1) predict a need for an additional 545sq m net by 2016, rising to

941sq m net by 2021 and 1,366sq m net by 2026. Therefore, whilst the latest 2016 estimate is slightly higher than the 2008 study, the 2021 prediction is lower to due to lower forecast growth rates across the assessment period.

2.17 However, the policy options analysis recognised the potential for Lydney to raise its market share in the future to stem (in part) the leakage of expenditure to larger surrounding centres. An increase in the town's market share in Zone 1 from 21% to 30% was tested. This is also adopted for the purposes of this updated assessment (see Table 16a2) and Lydney's quantitative capacity at 2016 will be 1,820sq m net, rising to 2,338sq m net at 2021 and 2,934sq m net at 2026. Like the constant market share analysis whilst the latest 2016 estimate is slightly higher than the 2008 study, the 2021 prediction is lower to due to lower forecast growth rates across the assessment period.

Cinderford

Convenience retail floorspace

2.18 Within our recommendations for the future of convenience retailing in Cinderford, we tested a constant market share scenario (i.e. existing shopping patterns continuing into the future) and also a scenario whereby the market share of convenience stores in Cinderford rising to 100% in Zone 3. This produced a floorspace capacity range of 823-1,156sq m net by 2016 and 925-1,259sq m net by 2021.

2.19 If similar assumptions are made in relation to our updated assessment, then the capacity range at 2016 will be 724-1,293sq m, rising to 801-1,389sq m net at 2021 and 881-1,504sq m net at 2026.

2.20 As noted at paragraph 6.36 of the 2008 Study, this approach is in line with our advice for the other main towns (i.e. self-containment via an increase in market share within the local area alone). However, the 2008 Study went on to acknowledge that there is potential for this capacity level to rise further where additional convenience expenditure from other parts of the study area is utilised to support a new large store. This statement was made in the context of the planning application for a large Tesco store on the Cinderford rugby club ground which would have altered shopping patterns across a large area of the central to northern Forest area and 40% of its turnover could have been supported by expenditure from non-Cinderford residents.

2.21 We would repeat the potential for this to occur in the context of the updated quantitative need assessment, with areas such as Zone 4(Drybrook/Lydbrook), the western parts of Zone 7(Newnham/Westbury) and the south-western parts of Zone 8 (Mitcheldean) potentially attracted to a large new store in Cinderford and thus raising its potential floorspace capacity. Indeed the scale of the previous Tesco was such that a significant amount of expenditure could have been drawn from Coleford which could lead to concerns over the deliverability of new convenience floorspace in Coleford alongside a large scale supermarket in Cinderford.

2.22 Having regard to the level of expenditure which a new foodstore in Cinderford could attract from outside of Zone 3, without necessarily negatively impacting upon available expenditure in Coleford, we consider that a global convenience goods capacity figure of around 2,000sq m net can be achieved. However, this is only a theoretical quantitative capacity figure and its true acceptability will depend upon the location of the proposed floorspace and its impact upon the health of Cinderford town centre.

Comparison retail floorspace

2.23 In terms of comparison floorspace capacity, Cinderford, like Lydney and the other main town centres was subject to a range of floorspace capacity forecasts based upon the constant market share forming the lower end of the spectrum with an increase in the town's market share in Zone 2 (up to 40%) forming the upper end of the range. The same assumptions are adopted for our latest analysis and the following capacity forecasts are shown in Tables 16b1 and 16b2:

- 642 – 1,611sq m net at 2016
- 1,116 – 2,199sq m net at 2021
- 1,650 – 2,861sq m net at 2026

2.24 Whilst the upper range of these capacity forecasts are potentially achieveable, there overall acceptability will depend upon the location of the proposed floorspace and its impact upon the health of Cinderford town centre.

Coleford

Convenience retail floorspace

2.25 The 2008 Study acknowledged the potential for Coleford convenience shopping market share in the local area (Zone 2), which currently stands at around 50%, to rise in the future and create more sustainable shopping trips. We tested a revised market share for Zone 2 of 90% which led to a capacity range of 300-1,100sq m net by 2016, rising to 370-1,220sq m net by 2021.

2.26 Within our updated assessment, the same range of forecasts were applied (i.e. constant market share at the lower end of the range and a 90% market share in Zone 2 at the upper end). In addition, the recently committed 300sq m net extension to the Co-op store has been included within both analyses, along with an associated uplift in the scenario shown in Table 15c1. Our updated is recorded in Tables 15c1 (constant market share – including commitment) and 15c2 (revised market share) which provides the following capacity range:

- 336-980sq m net by 2016
- 388-1,059sq m net by 2021
- 384-1,142sq m net by 2026

2.27 In line with our comments made in relation to future convenience goods floorspace capacity in Cinderford, there is potential for floorspace capacity levels slightly higher than those outlined above to be achieved where Coleford is able to attract additional expenditure from areas such as the western parts of Zone 4 (Lydbrook) and the northern parts of Zone 1. As such, theoretical capacity levels closer to 1,500sq m net could be achieved over the Core Strategy period although acceptability of this level of floorspace will depend upon the location of the proposed floorspace and its impact upon the health of Coleford town centre.

Comparison retail floorspace

2.28 In terms of comparison floorspace capacity, Coleford was subject to a range of floorspace capacity forecasts based upon the constant market share forming the lower end of the spectrum with an increase in the town's market share in Zone 3 (up to 20%)

forming the upper end of the range. The same assumptions are adopted for our latest analysis and the following capacity forecasts are shown in Tables 16c1 and 16c2:

- 84 – 920sq m net at 2016
- 279 – 1,187sq m net at 2021
- 479 – 1,507sq m net at 2026

2.29 These capacity forecasts are made on the assumption that the additional retail sales floorspace in the committed Co-op store extension is entirely devoted to convenience goods sales and therefore has no effect upon the comparison goods capacity forecasts. Like the 2008 study, the constant market share scenario for comparison goods shopping predicts only modest additional quantitative capacity levels reflecting the current state of retailing in Coleford. We consider that higher levels of capacity can be achieved via an increase in the town's market share in zone 3 although the acceptability of achieving these levels will depend upon the location of the proposed floorspace and its impact upon the health of Coleford town centre.

Newent

Convenience retail floorspace

2.30 The 2008 Study recorded the leakage of convenience goods expenditure from Newent which lies in Zone 8 in the study area. Three quarters of main food shopping trips leak to other settlements whilst three quarters of top-up food shopping trips are retained. In line with the policy options analysis for the other settlements, the 2008 Study tested a scenario whereby 70% of convenience goods expenditure generated by Zone 8 residents is retained within Newent (although to achieve this market share a substantial amount of new floorspace would need to be provided). With the constant market share scenatio forming the lower end of the capacity range and the 70% market share in Zone 8 forming the upper end, our updated assessment at Tables 15d1 & 15d2 indicates a new capacity range of:

- 591-1,276sq m net by 2016;
- 631-1,350sq m net by 2021; and
- 671-1,415sq m net by 2026.

2.31 Like the other settlements, these levels of floorspace capacity should be used as a guide and their overall acceptability, particularly the upper end of this capacity range, will depend upon the location of the proposed floorspace and its impact upon the health of Newent town centre. A substantial store, which is likely to be required to achieve the 70% market share outlined above, will have a significant impact upon shopping patterns and if provided outside of the town centre could well have a negative impact upon the health of Newent town centre.

Comparison retail floorspace

2.32 In the previous 2008 study, we modelled an increase in the market share of Newent's comparison goods shopping provision from 10% to 15% in zone 8, which formed the upper range of our quantitative capacity forecasts (with a constant market share forming the lower end of the range). Using the same assumptions, Tables 16d1 and 16d2 indicate the following capacity range:

- 229-1,115sq m net in 2016
- 399-1,361sq m net in 2021
- 584-1,673sq m net 2026

2.33 These capacity forecasts represent a slightly higher upper range should the increase in market share be achieved. Again, like other towns, it is dependant upon the location and impact of this level of floorspace being acceptable.

3. Summary

3.1 This report has been prepared by GVA in response to an instruction by Forest of Dean District Council ('FODDC'), dated February 2011, to prepare an update to the 2008 Forest of Dean Retail Study. The 2008 Study was prepared to provide essential background information and evidence to assist FODDC in the production of its Local Development Framework ('LDF'), particularly the Core Strategy.

3.2 Since the completion of the 2008 Study there have been a number of changes in the evidence base which informs the assessment of quantitative need for additional retail floorspace, including updated population growth forecasts, changes to the forecast growth in retail expenditure and retail floorspace efficiency and published average trading performance levels of grocery store operators. There are also a small number of retail commitments in Coleford and Cinderford. Therefore, in order to provide an up-to-date evidence base for FODDC's Core Strategy as it moves forward towards submission to the Secretary of State later this year, FODDC have instructed GVA to update the quantitative need forecasts for retail floorspace within the four main settlements across the District.

3.3 The following updated information has been included in this latest analysis:

- Updated base population and population growth assumptions
- Updated base per capita expenditure and expenditure growth forecasts
- Extending the quantitative assessment period up to 2026
- Updated assumptions regarding increases in floorspace efficiency over the assessment period
- Updated company average sales density performance levels for the convenience goods floorspace assessment
- Updated assumptions regarding the DIY store commitment in Cinderford and the recently permitted Co-op store extension in Coleford

3.4 On the basis of the above updates, we summarise below the levels of quantitative need for additional convenience (food) and comparison (non-food) goods floorspace in each of the four main towns in the District. For each of the four towns in terms of comparison goods floorspace capacity, the lower end of the capacity range is based on a constant market share in each town, whilst the upper end of the capacity range is based upon an appropriate and realistic increase in each town's market share. The same basis is employed for the convenience goods floorspace capcity levels in Coleford, Cinderford and Newent, although in Lydney the upper end of the capcity floorspace range is based upon Lydney being able to increase its local market share but also subject to some loss of available expenditure as a result of clawback of expenditure to Coleford and Cinderford as a consequence of new stores/floorspace in these towns.

3.5 In all cases, these levels of floorspace capacity should be used as a guide and their overall acceptability, particularly the upper end of this capacity range, will depend upon the location of the proposed floorspace and its impact upon the health of nearby town centres.

Table A: Recommended Levels of Convenience Floorspace Capacity in the Forest of Dean, 2011-2026

Town	Quantitative Need		
	2016	2021	2026
Lydney	Up to 570sq m	Up to 714sq m net	Up to 860sq m net
Cinderford	724-1,293sq m net	801-1,389sq m net	881-1,504sq m net
Coleford	336-980sq m net	388-1,059sq m net	384-1,142sq m net
Newent	591-1,276sq m net	631-1,350sq m net	671-1,1415sq m net

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.

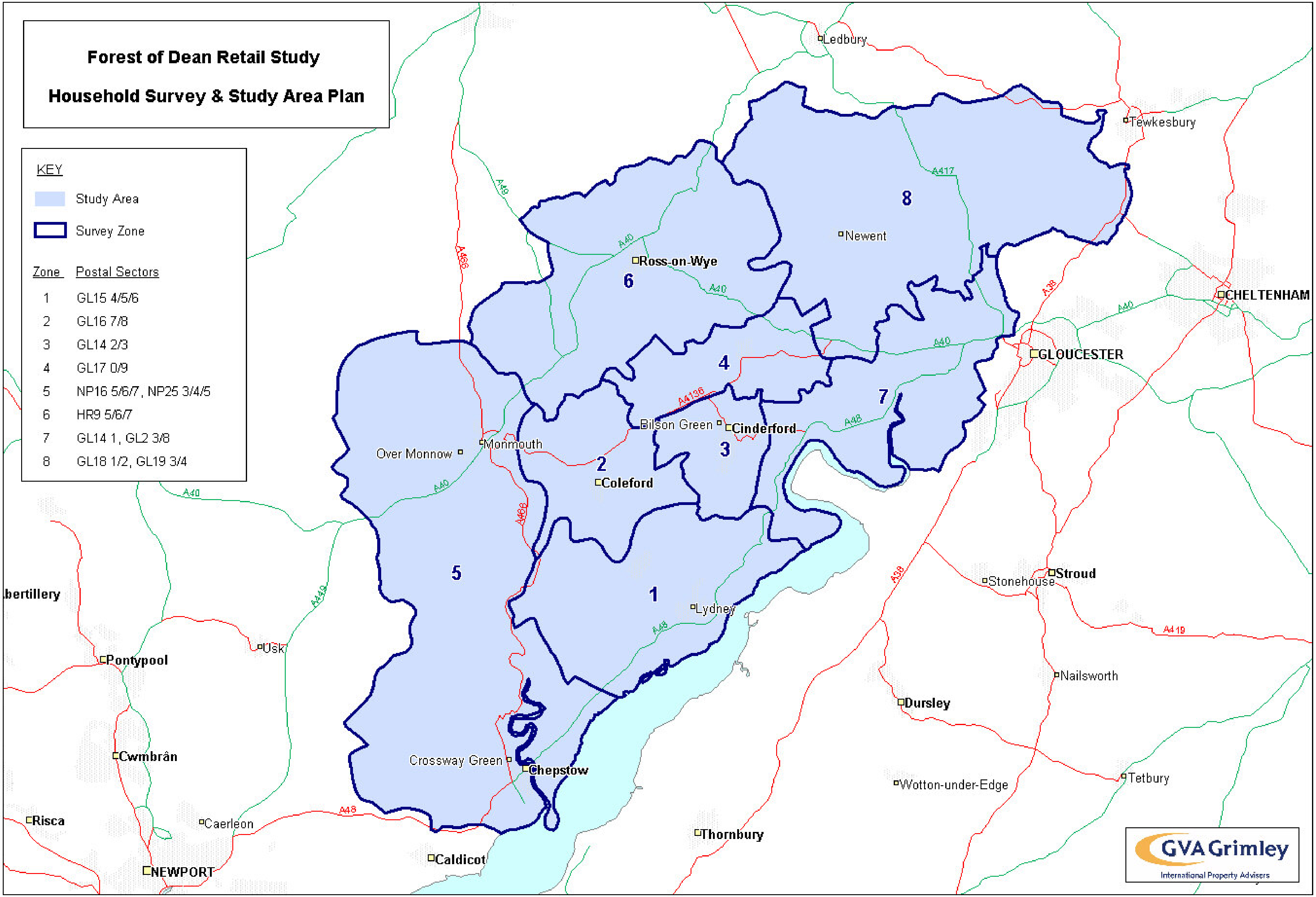
The upper end of the floorspace capacity projections are based on an indicative convenience sales density of £12,000/sq m at 2011 (projected forward using increases in floorspace efficiency up to 2026) and these projections should be reconsidered as and when planning applications are submitted.

Table B: Recommended Levels of Comparison Floorspace Capacity in the Forest of Dean, 2011-2026

Town	Quantitative Need		
	2012	2016	2021
Lydney	545-1,820sq m net	941-2,338sq m net	1,366-2,934sq m net
Cinderford	642-1,611sq m net	1,116-2,199sq m net	1,650-2,861sq m net
Coleford	84-920sq m net	279-1,187sq m net	479-1,507sq m net
Newent	229-1,115sq m net	399-1,361sq m net	584-1,673sq m net

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.

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

Updated Quantitative Need Assessment

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 1: POPULATION OF STUDY AREA, BY SURVEY ZONE (2011-2026)

ZONE	POSTCODE SECTORS	YEAR 2011	YEAR 2016	YEAR 2021	YEAR 2026		Change, 2011-16 No.	Change, 2011-16 (%)	Change, 2011-2021 No.	Change, 2011-2021 (%)
1	GL15 4									
LYDNEY	GL15 5									
	GL15 6									
	TOTAL	**21641**	**22094**	**22547**	**23000**		453	2.1	906	4.2
2	GL16 7									
COLEFORD	GL16 8									
	TOTAL	**13984**	**14139**	**14293**	**14448**		155	1.1	309	2.2
3	GL14 2									
CINDERFORD	GL14 3									
	TOTAL	**12163**	**12406**	**12649**	**12892**		243	2.0	486	4.0
4	GL17 0									
NORTH OF CINDERFORD	GL17 9									
	TOTAL	**11798**	**11875**	**11953**	**12030**		77	0.7	155	1.3
5	NP16 5 / 6 / 7									
CHEPSTOW/ MONMOUTH	NP25 3 / 4 / 5									
	TOTAL	**39575**	**41280**	**42684**	**45300**		1705	4.3	3109	7.9
6	HR9 5									
ROSS-ON-WYE	HR9 6									
	HR9 7									
	TOTAL	**20741**	**21083**	**21527**	**21956**		342	1.6	786	3.8
7	GL14 1									
WEST OF	GL2 3 / 8									
GLOUCESTER	**TOTAL**	**7888**	**7921**	**7954**	**7987**		33	0.4	66	0.8
8	GL18 1									
NEWENT	GL18 2									
	GL19 3									
	GL19 4									
	TOTAL	**16217**	**16316**	**16416**	**16515**		99	0.6	199	1.2
TOTAL		**144007**	**147115**	**150024**			**3108**	**2.2**	**6017**	**4.2**

Notes:

Population figures for each zone for 2011 derived from Experian Business Strategies Retail Planner Reports (dated February 2011). Data for Zones 5 & 6 for 2011-2026 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 2011-2026 **221** *(based on Gloucestershire County Council data)*

Distribution of Growth (by zone)

	%	People
1	41	91
2	14	31
3	22	49
4	7	15
7	3	7
8	9	20
Total	**96**	**212**

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TABLE 2: PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2011-2026

A: CONVENIENCE GOODS

ZONE	2011	2016	2021	2026
1	1812	1867	1924	1982
2	1788	1843	1899	1956
3	1776	1830	1885	1942
4	1826	1881	1938	1997
5	1860	1917	1975	2035
6	2014	2075	2138	2203
7	1970	2030	2091	2155
8	1907	1965	2025	2087

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2011	2016	2021	2026
1	599	705	829	975
2	575	677	796	936
3	570	670	788	927
4	595	700	824	969
5	643	757	890	1047
6	763	897	1055	1242
7	667	785	923	1086
8	630	741	871	1025

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2011	2016	2021	2026
1	288	339	399	469
2	275	324	381	448
3	255	299	352	414
4	282	331	389	458
5	290	341	401	471
6	366	431	507	596
7	362	425	500	589
8	333	392	461	543

D: DIY & DECORATING GOODS

ZONE	2011	2016	2021	2026
1	342	402	473	556
2	330	388	456	537
3	307	361	425	500
4	350	412	485	570
5	301	354	416	490
6	304	357	420	494
7	429	505	593	698
8	403	474	557	655

Notes:

Expenditure growth per annum for convenience goods assumed to be 0.6% and 3.3% for compa

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 2 (Continued): PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2011-2026

E: DOMESTIC APPLIANCES

ZONE	2011	2016	2021	2026
1	125	147	173	203
2	123	145	171	201
3	124	146	172	202
4	126	148	174	205
5	139	164	193	226
6	102	119	141	165
7	133	156	184	217
8	130	153	179	211

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

ZONE	2011	2016	2021	2026
1	401	472	555	653
2	397	467	550	646
3	395	465	547	643
4	405	476	560	659
5	324	381	448	527
6	499	587	690	812
7	428	503	592	696
8	415	489	575	676

G: PERSONAL & LUXURY GOODS

ZONE	2011	2016	2021	2026
1	506	595	700	823
2	496	583	686	807
3	465	547	643	756
4	512	603	709	834
5	494	582	684	805
6	551	648	763	897
7	589	692	814	958
8	551	648	762	896

H: RECREATIONAL GOODS

ZONE	2011	2016	2021	2026
1	503	592	697	819
2	485	571	671	790
3	458	539	634	746
4	509	599	705	829
5	491	578	679	799
6	644	758	891	1048
7	613	721	848	997
8	587	690	812	955

Notes:

Expenditure growth per annum for comparison goods assumed to be 3.3%.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 3: TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2011-2026

A: CONVENIENCE GOODS

ZONE	2011	2016	2021	2026
1	39.2	41.3	43.4	45.6
2	25.0	26.1	27.1	28.3
3	21.6	22.7	23.8	25.0
4	21.5	22.3	23.2	24.0
5	73.6	79.1	84.3	92.2
6	39.6	41.4	43.6	45.8
7	15.5	16.1	16.6	17.2
8	30.9	32.1	33.2	34.5
TOTAL	**267.0**	**281.1**	**295.3**	**312.6**

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2011	2016	2021	2026
1	13.0	15.6	18.7	22.4
2	8.0	9.6	11.4	13.5
3	6.9	8.3	10.0	11.9
4	7.0	8.3	9.8	11.7
5	25.5	31.2	38.0	47.4
6	15.8	18.9	22.7	27.3
7	5.3	6.2	7.3	8.7
8	10.2	12.1	14.3	16.9
TOTAL	**91.7**	**110.2**	**132.2**	**159.8**

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2011	2016	2021	2026
1	6.2	7.5	9.0	10.8
2	3.8	4.6	5.4	6.5
3	3.1	3.7	4.5	5.3
4	3.3	3.9	4.7	5.5
5	11.5	14.1	17.1	21.4
6	7.6	9.1	10.9	13.1
7	2.9	3.4	4.0	4.7
8	5.4	6.4	7.6	9.0
TOTAL	**43.8**	**52.6**	**63.1**	**76.2**

D: DIY & DECORATING GOODS

ZONE	2011	2016	2021	2026
1	7.4	8.9	10.7	12.8
2	4.6	5.5	6.5	7.8
3	3.7	4.5	5.4	6.4
4	4.1	4.9	5.8	6.9
5	11.9	14.6	17.8	22.2
6	6.3	7.5	9.0	10.9
7	3.4	4.0	4.7	5.6
8	6.5	7.7	9.1	10.8
TOTAL	**48.0**	**57.6**	**69.0**	**83.3**

Notes:

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

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 3 (Continued): TOTAL EXPENDITURE WITHIN S
BY GOODS CATEGORY AND ZON

E: DOMESTIC APPLIANCES

ZONE	2011	2016	2021	2026
1	2.7	3.2	3.9	4.7
2	1.7	2.1	2.4	2.9
3	1.5	1.8	2.2	2.6
4	1.5	1.8	2.1	2.5
5	5.5	6.8	8.2	10.3
6	2.1	2.5	3.0	3.6
7	1.0	1.2	1.5	1.7
8	2.1	2.5	2.9	3.5
TOTAL	**18.2**	**21.9**	**26.2**	**31.8**

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

ZONE	2011	2016	2021	2026
1	8.7	10.4	12.5	15.0
2	5.6	6.6	7.9	9.3
3	4.8	5.8	6.9	8.3
4	4.8	5.7	6.7	7.9
5	12.8	15.7	19.1	23.9
6	10.3	12.4	14.9	17.8
7	3.4	4.0	4.7	5.6
8	6.7	8.0	9.4	11.2
TOTAL	**57.1**	**68.5**	**82.1**	**99.0**

G: PERSONAL & LUXURY GOODS

ZONE	2011	2016	2021	2026
1	10.9	13.1	15.8	18.9
2	6.9	8.2	9.8	11.7
3	5.7	6.8	8.1	9.7
4	6.0	7.2	8.5	10.0
5	19.6	24.0	29.2	36.5
6	11.4	13.7	16.4	19.7
7	4.6	5.5	6.5	7.7
8	8.9	10.6	12.5	14.8
TOTAL	**74.2**	**89.1**	**106.8**	**129.0**

H: RECREATIONAL GOODS

ZONE	2011	2016	2021	2026
1	10.9	13.1	15.7	18.8
2	6.8	8.1	9.6	11.4
3	5.6	6.7	8.0	9.6
4	6.0	7.1	8.4	10.0
5	19.4	23.8	29.0	36.2
6	13.4	16.0	19.2	23.0
7	4.8	5.7	6.7	8.0
8	9.5	11.3	13.3	15.8
TOTAL	**76.4**	**91.7**	**110.0**	**132.8**

Notes:

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

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

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
Tuffins	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
Tuffins	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 5a: TURNOVER OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT, 2011

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	27.5	11.8	17.5	7.5	15.1	6.5	15.1	6.5	51.5	22.1	27.7	11.9	10.9	4.7	21.7	9.3	
LYDNEY																	
Town Centre																	
Tesco	16.0	3.4	5.1	0.5	1.6	0.0	0.2	0.1	2.1	0.0	0.0	0.2	0.9	0.0	0.5	0.1	30.6
Tuffins	3.4	2.4	0.4	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	6.7
Co-op	2.0	2.2	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	4.5
Local stores	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Sub-total	*21.4*	*8.6*	*5.4*	*0.8*	*1.6*	*0.0*	*0.3*	*0.2*	*2.1*	*0.0*	*0.0*	*0.2*	*1.0*	*0.0*	*0.5*	*0.2*	*42.4*
Cinderford																	
Co-op	0.0	0.5	0.0	0.0	7.5	4.4	1.6	1.1	0.0	0.0	0.0	0.0	0.2	0.1	0.2	0.0	15.6
Lidl	0.3	0.0	0.8	0.1	1.3	0.6	1.0	0.3	0.5	0.0	0.3	0.0	0.0	0.1	0.0	0.0	5.2
Local stores	0.0	0.0	0.0	0.0	0.2	1.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	1.6
Sub-total	*0.3*	*0.5*	*0.8*	*0.1*	*8.9*	*6.1*	*2.6*	*1.5*	*0.5*	*0.0*	*0.3*	*0.0*	*0.2*	*0.3*	*0.2*	*0.1*	*22.4*
COLEFORD																	
Town Centre																	
Co-op	0.3	0.0	3.9	2.7	0.0	0.0	0.3	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	7.5
Tuffins	0.0	0.2	3.3	1.0	0.0	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9
Tesco Express	0.0	0.0	0.4	0.9	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
Local stores	0.0	0.0	0.0	1.0	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3
Sub-total	*0.3*	*0.2*	*7.6*	*5.7*	*0.0*	*0.1*	*0.7*	*0.3*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*15.0*
NEWENT																	
Town Centre																	
Budgens	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.0	0.3	0.2	4.2	4.3	9.5
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	0.6	0.2	0.0	0.1	2.3	2.5	5.7
Sub-total	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.1*	*0.0*	*0.0*	*0.9*	*0.2*	*0.3*	*0.3*	*6.5*	*7.1*	*15.4*
Local stores																	
Co-op, Mitcheldean	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Mitcheldean (other)	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.4	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.7
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	0.7
Drybrook	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Ruardean	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.8
Bream	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	1.3
Yorkley	0.0	0.3	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	0.6
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	0.5
Redbrook	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Whitecroft	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
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	0.3	0.0	0.0	0.3
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
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*	*2.2*	*0.0*	*0.2*	*0.0*	*0.2*	*1.0*	*3.4*	*0.0*	*0.8*	*0.0*	*0.0*	*0.1*	*1.3*	*0.0*	*0.2*	*9.4*
Outside District	5.5	0.3	3.7	0.7	4.6	0.2	10.5	1.1	48.9	21.0	26.5	11.5	9.2	2.9	14.4	1.6	162.5
TOTAL	**27.5**	**11.8**	**17.5**	**7.5**	**15.1**	**6.5**	**15.1**	**6.5**	**51.5**	**22.1**	**27.7**	**11.9**	**10.9**	**4.7**	**21.7**	**9.3**	**267.0**

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 5b: TURNOVER OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT, 2016

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	28.9	12.4	18.2	7.8	15.9	6.8	15.6	6.7	55.4	23.7	29.0	12.4	11.3	4.8	22.4	9.6	
LYDNEY																	
Town Centre																	
Tesco	16.8	3.6	5.3	0.5	1.7	0.0	0.2	0.1	2.3	0.0	0.0	0.2	0.9	0.0	0.5	0.1	32.1
Tuffins	3.6	2.5	0.4	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	7.0
Co-op	2.1	2.3	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	4.7
Local stores	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
Sub-total	*22.6*	*9.1*	*5.7*	*0.8*	*1.7*	*0.0*	*0.3*	*0.2*	*2.3*	*0.0*	*0.0*	*0.2*	*1.0*	*0.0*	*0.5*	*0.3*	*44.5*
Cinderford																	
Co-op	0.0	0.5	0.0	0.0	7.9	4.6	1.6	1.1	0.0	0.0	0.0	0.0	0.2	0.1	0.2	0.0	16.3
Lidl	0.3	0.0	0.8	0.1	1.3	0.7	1.1	0.3	0.6	0.0	0.3	0.0	0.0	0.1	0.0	0.0	5.5
Local stores	0.0	0.0	0.0	0.0	0.2	1.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	1.6
Sub-total	*0.3*	*0.5*	*0.8*	*0.1*	*9.4*	*6.4*	*2.7*	*1.6*	*0.6*	*0.0*	*0.3*	*0.0*	*0.2*	*0.3*	*0.2*	*0.1*	*23.5*
COLEFORD																	
Town Centre																	
Co-op	0.3	0.0	4.0	2.8	0.0	0.0	0.4	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	7.8
Tuffins	0.0	0.2	3.4	1.1	0.0	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.1
Tesco Express	0.0	0.0	0.4	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	1.4
Local stores	0.0	0.0	0.0	1.1	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3
Sub-total	*0.3*	*0.2*	*7.9*	*6.0*	*0.0*	*0.1*	*0.7*	*0.3*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*15.7*
NEWENT																	
Town Centre																	
Budgens	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.0	0.3	0.2	4.4	4.5	9.8
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	0.3	0.3
Local stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.2	0.0	0.1	2.4	2.6	5.9
Sub-total	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.1*	*0.0*	*0.0*	*1.0*	*0.2*	*0.3*	*0.3*	*6.8*	*7.4*	*16.0*
Local stores																	
Co-op, Mitcheldean	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Mitcheldean (other)	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.7
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	0.7
Drybrook	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Ruardean	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.8
Bream	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	1.3
Yorkley	0.0	0.3	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	0.6
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	0.5
Redbrook	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Whitecroft	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
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	0.5
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	0.3	0.0	0.0	0.3
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
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*	*2.3*	*0.0*	*0.2*	*0.0*	*0.2*	*1.0*	*3.5*	*0.0*	*0.9*	*0.0*	*0.0*	*0.1*	*1.3*	*0.0*	*0.3*	*9.8*
Outside District	5.7	0.3	3.9	0.8	4.8	0.2	10.9	1.1	52.6	22.5	27.7	12.1	9.5	3.0	14.9	1.6	171.6
TOTAL	**28.9**	**12.4**	**18.2**	**7.8**	**15.9**	**6.8**	**15.6**	**6.7**	**55.4**	**23.7**	**29.0**	**12.4**	**11.3**	**4.8**	**22.4**	**9.6**	**281.1**

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 5c: TURNOVER OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT, 2021

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	30.4	13.0	19.0	8.1	16.7	7.2	16.2	7.0	59.0	25.3	30.5	13.1	11.6	5.0	23.3	10.0	
LYDNEY																	
Town Centre																	
Tesco	17.7	3.8	5.5	0.5	1.8	0.0	0.2	0.1	2.4	0.0	0.0	0.2	1.0	0.0	0.5	0.1	33.7
Tuffins	3.8	2.6	0.4	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	7.3
Co-op	2.2	2.4	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	4.9
Local stores	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
Sub-total	*23.7*	*9.5*	*5.9*	*0.8*	*1.8*	*0.0*	*0.4*	*0.2*	*2.4*	*0.0*	*0.0*	*0.2*	*1.1*	*0.0*	*0.5*	*0.3*	*46.7*
Cinderford																	
Co-op	0.0	0.5	0.0	0.0	8.3	4.9	1.7	1.2	0.0	0.0	0.0	0.0	0.2	0.1	0.3	0.0	17.1
Lidl	0.3	0.0	0.8	0.1	1.4	0.7	1.1	0.3	0.6	0.0	0.3	0.0	0.0	0.1	0.0	0.0	5.7
Local stores	0.0	0.0	0.0	0.0	0.2	1.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	1.7
Sub-total	*0.3*	*0.5*	*0.8*	*0.1*	*9.8*	*6.7*	*2.8*	*1.6*	*0.6*	*0.0*	*0.3*	*0.0*	*0.2*	*0.3*	*0.3*	*0.1*	*24.6*
COLEFORD																	
Town Centre																	
Co-op	0.3	0.0	4.2	3.0	0.0	0.0	0.4	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	8.2
Tuffins	0.0	0.2	3.6	1.1	0.0	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.3
Tesco Express	0.0	0.0	0.4	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	1.4
Local stores	0.0	0.0	0.0	1.1	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Sub-total	*0.3*	*0.2*	*8.2*	*6.2*	*0.0*	*0.1*	*0.7*	*0.3*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*16.3*
NEWENT																	
Town Centre																	
Budgens	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.0	0.4	0.2	4.5	4.7	10.2
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	0.3	0.3
Local stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.2	0.0	0.1	2.5	2.7	6.2
Sub-total	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.1*	*0.0*	*0.0*	*1.0*	*0.2*	*0.4*	*0.3*	*7.0*	*7.6*	*16.6*
Local stores																	
Co-op, Mitcheldean	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Mitcheldean (other)	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.8
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	0.6	0.0	0.0	0.8
Drybrook	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Ruardean	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.9
Bream	0.0	1.4	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	1.4
Yorkley	0.0	0.4	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	0.7
Longhope	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	0.1	0.0	0.1	0.6
Redbrook	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Whitecroft	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
Lydbrook	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
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	0.3	0.0	0.0	0.3
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
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*	*2.4*	*0.0*	*0.2*	*0.0*	*0.2*	*1.1*	*3.6*	*0.0*	*1.0*	*0.0*	*0.0*	*0.1*	*1.4*	*0.0*	*0.3*	*10.2*
Outside District	6.0	0.4	4.0	0.8	5.1	0.2	11.3	1.2	56.0	24.0	29.2	12.7	9.9	3.1	15.5	1.7	180.9
TOTAL	**30.4**	**13.0**	**19.0**	**8.1**	**16.7**	**7.2**	**16.2**	**7.0**	**59.0**	**25.3**	**30.5**	**13.1**	**11.6**	**5.0**	**23.3**	**10.0**	**295.3**

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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FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 5d: TURNOVER OF CONVENIENCE FACILITIES IN FOREST OF DEAN DISTRICT, 2026

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	31.9	13.7	19.8	8.5	17.5	7.5	16.8	7.2	64.5	27.7	32.1	13.7	12.0	5.2	24.1	10.3	
LYDNEY																	
Town Centre																	
Tesco	18.6	4.0	5.7	0.5	1.8	0.0	0.2	0.1	2.6	0.0	0.0	0.2	1.0	0.0	0.5	0.1	35.5
Tuffins	4.0	2.7	0.4	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	7.7
Co-op	2.3	2.6	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	5.2
Local stores	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
Sub-total	*24.9*	*10.0*	*6.2*	*0.9*	*1.8*	*0.0*	*0.4*	*0.2*	*2.6*	*0.0*	*0.0*	*0.2*	*1.1*	*0.0*	*0.5*	*0.3*	*49.1*
Cinderford																	
Co-op	0.0	0.5	0.0	0.0	8.7	5.1	1.7	1.2	0.0	0.0	0.0	0.0	0.2	0.1	0.3	0.0	17.9
Lidl	0.3	0.0	0.9	0.1	1.5	0.7	1.2	0.3	0.6	0.0	0.4	0.0	0.0	0.1	0.0	0.0	6.0
Local stores	0.0	0.0	0.0	0.0	0.2	1.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	1.8
Sub-total	*0.3*	*0.5*	*0.9*	*0.1*	*10.3*	*7.1*	*2.9*	*1.7*	*0.6*	*0.0*	*0.4*	*0.0*	*0.2*	*0.3*	*0.3*	*0.1*	*25.8*
COLEFORD																	
Town Centre																	
Co-op	0.3	0.0	4.4	3.1	0.0	0.0	0.4	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	8.5
Tuffins	0.0	0.2	3.7	1.2	0.0	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5
Tesco Express	0.0	0.0	0.4	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5
Local stores	0.0	0.0	0.0	1.2	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Sub-total	*0.3*	*0.2*	*8.6*	*6.5*	*0.0*	*0.1*	*0.8*	*0.3*	*0.0*	*0.4*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*17.0*
NEWENT																	
Town Centre																	
Budgens	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.4	0.0	0.4	0.2	4.7	4.8	10.6
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	0.3	0.3
Local stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.2	0.0	0.1	2.6	2.8	6.4
Sub-total	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.1*	*0.0*	*0.0*	*1.1*	*0.2*	*0.4*	*0.3*	*7.3*	*7.9*	*17.2*
Local stores																	
Co-op, Mitcheldean	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Mitcheldean (other)	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.9
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	0.6	0.0	0.0	0.8
Drybrook	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Ruardean	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.9
Bream	0.0	1.5	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	1.5
Yorkley	0.0	0.4	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	0.7
Longhope	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	0.1	0.0	0.1	0.6
Redbrook	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.7
Whitecroft	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
Lydbrook	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
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	0.3	0.0	0.0	0.3
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
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*	*2.6*	*0.0*	*0.2*	*0.0*	*0.2*	*1.1*	*3.7*	*0.0*	*1.1*	*0.0*	*0.0*	*0.1*	*1.4*	*0.0*	*0.3*	*10.7*
Outside District	6.4	0.4	4.2	0.8	5.3	0.2	11.7	1.2	61.2	26.2	30.7	13.4	10.2	3.2	16.0	1.7	192.8
TOTAL	**31.9**	**13.7**	**19.8**	**8.5**	**17.5**	**7.5**	**16.8**	**7.2**	**64.5**	**27.7**	**32.1**	**13.7**	**12.0**	**5.2**	**24.1**	**10.3**	**312.6**

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 6a: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES, 2011

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	0.3	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	0.2	0.0	0.5	0.6
Other Destinations	92.9	96.3	88.9	96.3	100.0	98.9	98.8	95.5		12.0	7.7	6.2	6.8	25.5	15.6	5.2	9.8	88.8
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**13.0**	**8.0**	**6.9**	**7.0**	**25.5**	**15.8**	**5.3**	**10.2**	**91.7**

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 6b: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES, 2016

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	0.9	0.3	0.0	0.0	0.1	0.0	1.3
Lydney	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0		1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Coleford	0.0	3.7	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	1.1	0.0	4.5		0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.5	0.8
Other Destinations	92.9	96.3	88.9	96.3	100.0	98.9	98.8	95.5		14.5	9.2	7.4	8.0	31.2	18.7	6.1	11.5	106.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**15.6**	**9.6**	**8.3**	**8.3**	**31.2**	**18.9**	**6.2**	**12.1**	**110.2**

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 6c: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES, 2021

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	0.0	0.0	11.1	3.7	0.0	0.0	1.2	0.0		0.0	0.0	1.1	0.4	0.0	0.0	0.1	0.0	1.6
Lydney	7.1	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	1.3
Coleford	0.0	3.7	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	1.1	0.0	4.5		0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.6	0.9
Other Destinations	92.9	96.3	88.9	96.3	100.0	98.9	98.8	95.5		17.4	11.0	8.9	9.5	38.0	22.5	7.3	13.7	128.0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**18.7**	**11.4**	**10.0**	**9.8**	**38.0**	**22.7**	**7.3**	**14.3**	**132.2**

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 6d: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES, 2026

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	0.0	0.0	11.1	3.7	0.0	0.0	1.2	0.0		0.0	0.0	1.3	0.4	0.0	0.0	0.1	0.0	1.9
Lydney	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0		1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6
Coleford	0.0	3.7	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.5
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	0.3	0.0	0.8	1.1
Other Destinations	92.9	96.3	88.9	96.3	100.0	98.9	98.8	95.5		20.8	13.0	10.6	11.2	47.4	27.0	8.6	16.2	154.8
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**22.4**	**13.5**	**11.9**	**11.7**	**47.4**	**27.3**	**8.7**	**16.9**	**159.8**

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 7a: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES, 2011

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	0.0	0.0	13.2	6.1	0.0	1.7	1.6	0.0		0.0	0.0	0.4	0.2	0.0	0.1	0.0	0.0	0.8
Lydney	11.1	1.5	0.0	0.0	0.0	0.0	0.0	0.0		0.7	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Coleford	6.9	20.9	5.3	4.5	1.4	0.0	0.0	1.5		0.4	0.8	0.2	0.1	0.2	0.0	0.0	0.1	1.8
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		5.1	3.0	2.5	3.0	11.3	7.3	2.8	5.0	40.0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**6.2**	**3.8**	**3.1**	**3.3**	**11.5**	**7.6**	**2.9**	**5.4**	**43.8**

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 7b: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES, 2016

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
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	0.2	0.1	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	1.0	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	0.2	0.0	0.4	0.5
Other Destinations	82.0	77.6	81.5	89.4	98.6	96.6	98.4	92.4		6.1	3.6	3.0	3.5	13.9	8.8	3.3	5.9	48.1
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**7.5**	**4.6**	**3.7**	**3.9**	**14.1**	**9.1**	**3.4**	**6.4**	**52.6**

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 7c: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES, 2021

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	0.0	0.0	13.2	6.1	0.0	1.7	1.6	0.0		0.0	0.0	0.6	0.3	0.0	0.2	0.1	0.0	1.1
Lydney	11.1	1.5	0.0	0.0	0.0	0.0	0.0	0.0		1.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Coleford	6.9	20.9	5.3	4.5	1.4	0.0	0.0	1.5		0.6	1.1	0.2	0.2	0.2	0.0	0.0	0.1	2.6
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	0.2	0.0	0.5	0.6
Other Destinations	82.0	77.6	81.5	89.4	98.6	96.6	98.4	92.4		7.4	4.2	3.6	4.2	16.9	10.5	3.9	7.0	57.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**9.0**	**5.4**	**4.5**	**4.7**	**17.1**	**10.9**	**4.0**	**7.6**	**63.1**

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 7d: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES, 2026

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	0.7	0.3	0.0	0.2	0.1	0.0	1.3
Lydney	11.1	1.5	0.0	0.0	0.0	0.0	0.0	0.0		1.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.3
Coleford	6.9	20.9	5.3	4.5	1.4	0.0	0.0	1.5		0.7	1.4	0.3	0.2	0.3	0.0	0.0	0.1	3.1
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	0.2	0.0	0.5	0.8
Other Destinations	82.0	77.6	81.5	89.4	98.6	96.6	98.4	92.4		8.8	5.0	4.4	4.9	21.1	12.6	4.6	8.3	69.8
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**10.8**	**6.5**	**5.3**	**5.5**	**21.4**	**13.1**	**4.7**	**9.0**	**76.2**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 8a: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES, 2011

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	0.4	0.0	0.0	0.2	0.0	1.9
Lydney	24.4	0.0	0.0	0.0	0.0	0.0	1.2	0.0		1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8
Coleford	4.9	17.3	1.1	0.0	1.2	0.0	0.0	0.0		0.4	0.8	0.0	0.0	0.1	0.0	0.0	0.0	1.3
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	0.2	0.0	1.7	1.9
Other Destinations	70.7	82.7	65.6	90.4	98.8	96.2	91.3	74.7		5.2	3.8	2.5	3.7	11.8	6.1	3.1	4.9	41.0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**7.4**	**4.6**	**3.7**	**4.1**	**11.9**	**6.3**	**3.4**	**6.5**	**48.0**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 8b: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES, 2016

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	1.5	0.5	0.0	0.0	0.3	0.0	2.2
Lydney	24.4	0.0	0.0	0.0	0.0	0.0	1.2	0.0		2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2
Coleford	4.9	17.3	1.1	0.0	1.2	0.0	0.0	0.0		0.4	0.9	0.0	0.0	0.2	0.0	0.0	0.0	1.6
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	2.0	2.3
Other Destinations	70.7	82.7	65.6	90.4	98.8	96.2	91.3	74.7		6.3	4.5	2.9	4.4	14.4	7.2	3.6	5.8	49.3
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**8.9**	**5.5**	**4.5**	**4.9**	**14.6**	**7.5**	**4.0**	**7.7**	**57.6**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 8c: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES, 2021

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	1.8	0.6	0.0	0.0	0.3	0.0	2.6
Lydney	24.4	0.0	0.0	0.0	0.0	0.0	1.2	0.0		2.6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.7
Coleford	4.9	17.3	1.1	0.0	1.2	0.0	0.0	0.0		0.5	1.1	0.1	0.0	0.2	0.0	0.0	0.0	1.9
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	0.1	2.3	2.7
Other Destinations	70.7	82.7	65.6	90.4	98.8	96.2	91.3	74.7		7.5	5.4	3.5	5.2	17.6	8.7	4.3	6.8	59.1
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**10.7**	**6.5**	**5.4**	**5.8**	**17.8**	**9.0**	**4.7**	**9.1**	**69.0**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 8d: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES, 2026

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	2.1	0.7	0.0	0.0	0.4	0.0	3.2
Lydney	24.4	0.0	0.0	0.0	0.0	0.0	1.2	0.0		3.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	3.2
Coleford	4.9	17.3	1.1	0.0	1.2	0.0	0.0	0.0		0.6	1.3	0.1	0.0	0.3	0.0	0.0	0.0	2.3
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	0.4	0.1	2.7	3.2
Other Destinations	70.7	82.7	65.6	90.4	98.8	96.2	91.3	74.7		9.0	6.4	4.2	6.2	21.9	10.4	5.1	8.1	71.4
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**12.8**	**7.8**	**6.4**	**6.9**	**22.2**	**10.9**	**5.6**	**10.8**	**83.3**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 9a: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES, 2011

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	2.6	0.0	44.6	13.0	1.4	0.0	3.9	1.2		0.1	0.0	0.7	0.2	0.1	0.0	0.0	0.0	1.1
Lydney	34.2	3.9	3.6	0.0	2.8	1.3	0.0	0.0		0.9	0.1	0.1	0.0	0.2	0.0	0.0	0.0	1.2
Coleford	10.5	40.8	1.2	11.6	0.0	0.0	0.0	0.0		0.3	0.7	0.0	0.2	0.0	0.0	0.0	0.0	1.2
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		1.4	1.0	0.8	1.1	5.3	2.1	1.0	2.0	14.6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**2.7**	**1.7**	**1.5**	**1.5**	**5.5**	**2.1**	**1.0**	**2.1**	**18.2**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 9b: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES, 2016

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	0.8	0.2	0.1	0.0	0.0	0.0	1.3
Lydney	34.2	3.9	3.6	0.0	2.8	1.3	0.0	0.0		1.1	0.1	0.1	0.0	0.2	0.0	0.0	0.0	1.5
Coleford	10.5	40.8	1.2	11.6	0.0	0.0	0.0	0.0		0.3	0.8	0.0	0.2	0.0	0.0	0.0	0.0	1.4
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		1.7	1.1	0.9	1.3	6.5	2.5	1.2	2.4	17.6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**3.2**	**2.1**	**1.8**	**1.8**	**6.8**	**2.5**	**1.2**	**2.5**	**21.9**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
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TABLE 9c: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES, 2021

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	1.0	0.3	0.1	0.0	0.1	0.0	1.5
Lydney	34.2	3.9	3.6	0.0	2.8	1.3	0.0	0.0		1.3	0.1	0.1	0.0	0.2	0.0	0.0	0.0	1.8
Coleford	10.5	40.8	1.2	11.6	0.0	0.0	0.0	0.0		0.4	1.0	0.0	0.2	0.0	0.0	0.0	0.0	1.7
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		2.1	1.3	1.1	1.6	7.9	3.0	1.4	2.8	21.1
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**3.9**	**2.4**	**2.2**	**2.1**	**8.2**	**3.0**	**1.5**	**2.9**	**26.2**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 9d: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES, 2026

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	1.2	0.3	0.1	0.0	0.1	0.0	1.9
Lydney	34.2	3.9	3.6	0.0	2.8	1.3	0.0	0.0		1.6	0.1	0.1	0.0	0.3	0.0	0.0	0.0	2.1
Coleford	10.5	40.8	1.2	11.6	0.0	0.0	0.0	0.0		0.5	1.2	0.0	0.3	0.0	0.0	0.0	0.0	2.0
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		2.5	1.6	1.3	1.9	9.8	3.6	1.7	3.3	25.6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**4.7**	**2.9**	**2.6**	**2.5**	**10.3**	**3.6**	**1.7**	**3.5**	**31.8**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
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TABLE 10a: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES, 2011

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	1.3	0.3	0.2	0.0	0.0	0.0	2.0
Lydney	37.7	3.1	6.0	0.0	1.5	0.0	3.3	0.0		3.3	0.2	0.3	0.0	0.2	0.0	0.1	0.0	4.0
Coleford	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.5
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		5.4	4.8	3.2	4.4	12.4	10.3	3.3	6.7	50.6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		8.7	5.6	4.8	4.8	12.8	10.3	3.4	6.7	57.1

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.

2009 PRICES

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FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 10b: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES, 2016

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	1.6	0.4	0.2	0.0	0.0	0.0	2.3
Lydney	37.7	3.1	6.0	0.0	1.5	0.0	3.3	0.0		3.9	0.2	0.3	0.0	0.2	0.0	0.1	0.0	4.8
Coleford	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
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		6.5	5.7	3.8	5.2	15.2	12.4	3.9	8.0	60.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**10.4**	**6.6**	**5.8**	**5.7**	**15.7**	**12.4**	**4.0**	**8.0**	68.5

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
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TABLE 10c: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES, 2021

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	1.9	0.5	0.3	0.0	0.0	0.0	2.8
Lydney	37.7	3.1	6.0	0.0	1.5	0.0	3.3	0.0		4.7	0.2	0.4	0.0	0.3	0.0	0.2	0.0	5.8
Coleford	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.7
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		7.8	6.8	4.6	6.2	18.5	14.9	4.6	9.4	72.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**12.5**	**7.9**	**6.9**	**6.7**	**19.1**	**14.9**	**4.7**	**9.4**	82.1

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.

2009 PRICES

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TABLE 10d: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES, 2026

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	2.3	0.6	0.4	0.0	0.0	0.0	3.4
Lydney	37.7	3.1	6.0	0.0	1.5	0.0	3.3	0.0		5.7	0.3	0.5	0.0	0.4	0.0	0.2	0.0	7.0
Coleford	0.0	9.2	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	0.9
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		9.4	8.1	5.5	7.3	23.1	17.8	5.4	11.2	87.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**15.0**	**9.3**	**8.3**	**7.9**	**23.9**	**17.8**	**5.6**	**11.2**	99.0

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 11a: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES, 2011

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	0.0	0.0	32.1	7.2	0.0	0.0	2.9	0.0		0.0	0.0	1.8	0.4	0.0	0.0	0.1	0.0	2.4
Lydney	31.3	0.0	0.0	0.0	0.0	0.0	2.9	0.0		3.4	0.0	0.0	0.0	0.0	0.0	0.1	0.0	3.6
Coleford	1.5	20.6	0.0	1.4	0.0	0.0	0.0	0.0		0.2	1.4	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		7.4	5.5	3.8	5.5	19.6	11.3	4.2	7.1	64.4
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**10.9**	**6.9**	**5.7**	**6.0**	**19.6**	**11.4**	**4.6**	**8.9**	**74.2**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 11b: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES, 2016

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	2.2	0.5	0.0	0.0	0.2	0.0	2.9
Lydney	31.3	0.0	0.0	0.0	0.0	0.0	2.9	0.0		4.1	0.0	0.0	0.0	0.0	0.0	0.2	0.0	4.3
Coleford	1.5	20.6	0.0	1.4	0.0	0.0	0.0	0.0		0.2	1.7	0.0	0.1	0.0	0.0	0.0	0.0	2.0
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	0.2	2.2	2.5
Other Destinations	67.2	79.4	67.9	91.4	100.0	98.6	91.3	79.2		8.8	6.5	4.6	6.5	24.0	13.5	5.0	8.4	77.4
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**13.1**	**8.2**	**6.8**	**7.2**	**24.0**	**13.7**	**5.5**	**10.6**	**89.1**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 11c: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES, 2021

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	2.6	0.6	0.0	0.0	0.2	0.0	3.4
Lydney	31.3	0.0	0.0	0.0	0.0	0.0	2.9	0.0		4.9	0.0	0.0	0.0	0.0	0.0	0.2	0.0	5.1
Coleford	1.5	20.6	0.0	1.4	0.0	0.0	0.0	0.0		0.2	2.0	0.0	0.1	0.0	0.0	0.0	0.0	2.4
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	0.2	2.6	3.0
Other Destinations	67.2	79.4	67.9	91.4	100.0	98.6	91.3	79.2		10.6	7.8	5.5	7.7	29.2	16.2	5.9	9.9	92.9
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**15.8**	**9.8**	**8.1**	**8.5**	**29.2**	**16.4**	**6.5**	**12.5**	**106.8**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 11d: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES, 2026

CENTRE	MARKET SHARE (%)									TURNOVER (£m)								TURNOVER
	1	2	3	4	5	6	7	8		1	2	3	4	5	6	7	8	(£m)
Cinderford	0.0	0.0	32.1	7.2	0.0	0.0	2.9	0.0		0.0	0.0	3.1	0.7	0.0	0.0	0.2	0.0	4.1
Lydney	31.3	0.0	0.0	0.0	0.0	0.0	2.9	0.0		5.9	0.0	0.0	0.0	0.0	0.0	0.2	0.0	6.1
Coleford	1.5	20.6	0.0	1.4	0.0	0.0	0.0	0.0		0.3	2.4	0.0	0.1	0.0	0.0	0.0	0.0	2.8
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	0.3	0.2	3.1	3.6
Other Destinations	67.2	79.4	67.9	91.4	100.0	98.6	91.3	79.2		12.7	9.3	6.6	9.2	36.5	19.4	7.0	11.7	112.4
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**18.9**	**11.7**	**9.7**	**10.0**	**36.5**	**19.7**	**7.7**	**14.8**	**129.0**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 12a: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES, 2011

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	0.2	0.4	0.0	0.0	0.0	1.4
Lydney	18.2	2.2	0.0	0.0	0.0	0.0	0.0	0.0		2.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	2.1
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		0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.5
Other Destinations	79.5	93.4	87.5	97.4	97.7	100.0	100.0	97.6		8.7	6.3	4.9	5.9	19.0	13.4	4.8	9.3	72.2
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**10.9**	**6.8**	**5.6**	**6.0**	**19.4**	**13.4**	**4.8**	**9.5**	**76.4**

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.

2009 PRICES

FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 12b: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES, 2016

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	0.2	0.8	0.2	0.5	0.0	0.0	0.0	1.7
Lydney	18.2	2.2	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	2.6
Coleford	0.0	2.2	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	0.2
Newent	2.3	0.0	0.0	0.0	0.0	0.0	0.0	2.4		0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.6
Other Destinations	79.5	93.4	87.5	97.4	97.7	100.0	100.0	97.6		10.4	7.5	5.9	6.9	23.3	16.0	5.7	11.0	86.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**13.1**	**8.1**	**6.7**	**7.1**	**23.8**	**16.0**	**5.7**	**11.3**	**91.7**

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 UPDATE 2011

TABLE 12c: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES, 2021

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	0.2	1.0	0.2	0.7	0.0	0.0	0.0	2.1
Lydney	18.2	2.2	0.0	0.0	0.0	0.0	0.0	0.0		2.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	3.1
Coleford	0.0	2.2	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	0.2
Newent	2.3	0.0	0.0	0.0	0.0	0.0	0.0	2.4		0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.7
Other Destinations	79.5	93.4	87.5	97.4	97.7	100.0	100.0	97.6		12.5	9.0	7.0	8.2	28.3	19.2	6.7	13.0	103.9
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**15.7**	**9.6**	**8.0**	**8.4**	**29.0**	**19.2**	**6.7**	**13.3**	**110.0**

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 RETAIL STUDY UPDATE 2011

TABLE 12d: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES, 2026

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	0.3	1.2	0.3	0.8	0.0	0.0	0.0	2.5
Lydney	18.2	2.2	0.0	0.0	0.0	0.0	0.0	0.0		3.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	3.7
Coleford	0.0	2.2	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	2.3	0.0	0.0	0.0	0.0	0.0	0.0	2.4		0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.8
Other Destinations	79.5	93.4	87.5	97.4	97.7	100.0	100.0	97.6		15.0	10.7	8.4	9.7	35.4	23.0	8.0	15.4	125.5
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**18.8**	**11.4**	**9.6**	**10.0**	**36.2**	**23.0**	**8.0**	**15.8**	**132.8**

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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TABLE 13a: TOTAL COMPARISON TURNOVER OF MAIN FOREST OF DEAN TOWN CENTRES, 2011

CENTRE	ZONE								TURNOVER (£m)	STUDY AREA MARKET SHARE (%)
	1	2	3	4	5	6	7	8		
Cinderford	0.1	0.2	6.9	2.0	0.7	0.1	0.5	0.0	10.6	2.6
Lydney	13.0	0.4	0.3	0.0	0.3	0.0	0.3	0.0	14.5	3.5
Coleford	1.2	4.7	0.2	0.4	0.3	0.0	0.0	0.1	6.9	1.7
Newent	0.3	0.0	0.0	0.0	0.0	0.7	0.2	4.6	5.7	1.4
TOTAL	**59.8**	**37.5**	**31.3**	**32.8**	**106.1**	**67.0**	**25.4**	**49.4**	**409.4**	**100.0**

Notes:

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

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FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 13b: TOTAL COMPARISON TURNOVER OF MAIN FOREST OF DEAN TOWN CENTRES, 2016

CENTRE	ZONE								TURNOVER (£m)	STUDY AREA MARKET SHARE (%)
	1	2	3	4	5	6	7	8		
Cinderford	0.1	0.3	8.3	2.4	0.9	0.2	0.6	0.0	12.7	2.6
Lydney	15.6	0.5	0.4	0.0	0.4	0.0	0.3	0.0	17.4	3.5
Coleford	1.5	5.6	0.3	0.5	0.4	0.0	0.0	0.1	8.3	1.7
Newent	0.3	0.0	0.0	0.0	0.0	0.8	0.2	5.4	6.8	1.4
TOTAL	**71.8**	**44.6**	**37.6**	**38.8**	**130.2**	**80.1**	**30.0**	**58.5**	**491.6**	**100.0**

Notes:

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

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FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 13c: TOTAL COMPARISON TURNOVER OF MAIN FOREST OF DEAN TOWN CENTRES, 2021

CENTRE	ZONE								TURNOVER (£m)	STUDY AREA MARKET SHARE (%)
	1	2	3	4	5	6	7	8		
Cinderford	0.1	0.3	10.0	2.8	1.1	0.2	0.7	0.0	15.2	2.6
Lydney	18.8	0.6	0.5	0.0	0.5	0.0	0.4	0.0	20.9	3.5
Coleford	1.8	6.6	0.3	0.6	0.5	0.0	0.0	0.1	9.9	1.7
Newent	0.4	0.0	0.0	0.0	0.0	1.0	0.2	6.4	8.1	1.4
TOTAL	**86.2**	**53.0**	**45.0**	**46.0**	**158.4**	**96.2**	**35.4**	**69.2**	**589.5**	**100.0**

Notes:

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

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FOREST OF DEAN DISTRICT COUNCIL
FOREST OF DEAN RETAIL STUDY UPDATE 2011

TABLE 13d: TOTAL COMPARISON TURNOVER OF MAIN FOREST OF DEAN TOWN CENTRES, 2026

CENTRE	ZONE								TURNOVER (£m)	STUDY AREA MARKET SHARE (%)
	1	2	3	4	5	6	7	8		
Cinderford	0.1	0.4	12.0	3.3	1.3	0.2	0.8	0.0	18.2	2.6
Lydney	22.5	0.8	0.6	0.0	0.6	0.0	0.5	0.0	25.0	3.5
Coleford	2.1	7.9	0.4	0.7	0.6	0.0	0.0	0.1	11.8	1.7
Newent	0.4	0.0	0.0	0.0	0.0	1.2	0.3	7.6	9.6	1.3
TOTAL	**103.5**	**63.1**	**54.0**	**54.4**	**197.7**	**115.4**	**41.9**	**81.9**	**711.8**	**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, 2011

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	12842	20.1
Tuffins	910	95	865	4779	4.1
Co-op	1672	80	1338	7530	10.1
Local stores	541	90	487	4000	1.9
Sub-total					*36.3*
Cinderford					
Co-op	1858	70	1301	7530	9.8
Lidl	1086	80	869	2971	2.6
Local stores	1014	90	913	4000	3.7
Sub-total					*16.0*
COLEFORD					
Town Centre					
Co-op	929	80	743	7530	5.6
Tuffins	474	95	450	4779	2.2
Tesco Express	217	95	206	12842	2.7
Local stores	678	90	610	4000	2.4
Sub-total					*12.8*
NEWENT					
Town Centre					
Budgens	615	95	584	7500	4.4
Co-op	196	95	186	7530	1.4
Local stores	1241	90	1117	4000	4.5
Sub-total					*10.2*

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 2011-2026

A1: Lydney

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	42.4	43.5	45.7	48.1
Market Share (%)	15.9	15.5	15.5	15.4
Expenditure Inflow (£m)	1.5	1.5	1.6	1.7
Total Turnover Potential (£m)	43.8	45.1	47.3	49.7
Baseline Turnover of Existing Facilities (£m)	36.3	36.6	37.0	37.4
Residual Expenditure (£m)	**7.6**	**8.5**	**10.3**	**12.4**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**632**	**698**	**845**	**1,002**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

A2: Lydney

Increase in Lydney's market share in Zone 1 to 90%

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	42.4	49.1	51.6	54.3
Market Share (%)	15.9	17.5	17.5	17.4
Expenditure Inflow (£m)	1.5	1.5	1.6	1.7
Total Turnover Potential (£m)	43.8	50.7	53.2	55.9
Baseline Turnover of Existing Facilities (£m)	36.3	36.6	37.0	37.4
Residual Expenditure (£m)	**7.6**	**14.1**	**16.2**	**18.6**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**632**	**1,160**	**1,327**	**1,503**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above)
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

A3: Lydney

Increase in Lydney's market share in Zone 1 to 90%, plus clawback of expenditure as a result of new stores in Cinderford and Coleford

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	42.4	42.0	44.1	46.3
Market Share (%)	15.9	14.9	14.9	14.8
Expenditure Inflow (£m)	1.5	1.5	1.6	1.7
Total Turnover Potential (£m)	43.8	43.5	45.7	48.0
Baseline Turnover of Existing Facilities (£m)	36.3	36.6	37.0	37.4
Residual Expenditure (£m)	**7.6**	**6.9**	**8.7**	**10.6**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**632**	**570**	**714**	**860**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above)
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

A4: Lydney

Constant market share for Zone 1 and clawback of expenditure as a result of new stores in Cinderford and Coleford

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	42.4	36.4	38.2	40.1
Market Share (%)	15.9	13.0	12.9	12.8
Expenditure Inflow (£m)	1.5	1.5	1.6	1.7
Total Turnover Potential (£m)	43.8	37.9	39.8	41.8
Baseline Turnover of Existing Facilities (£m)	36.3	36.6	37.0	37.4
Residual Expenditure (£m)	**7.6**	**1.3**	**2.8**	**4.4**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**632**	**108**	**232**	**359**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above)
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

B1: Cinderford

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	22.4	23.5	24.6	25.8
Market Share (%)	8.4	8.3	8.3	8.2
Expenditure Inflow (£m)	1.4	1.5	1.6	1.6
Total Turnover Potential (£m)	23.8	25.0	26.1	27.4
Baseline Turnover of Existing Facilities (£m)	16.0	16.2	16.3	16.5
Residual Expenditure (£m)	**7.8**	**8.8**	**9.8**	**10.9**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**649**	**724**	**801**	**881**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

B2: Cinderford

Increase in Cinderford's market share in Zone 3 to 100%

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	22.4	30.4	31.8	33.5
Market Share (%)	8.4	10.8	10.8	10.7
Expenditure Inflow (£m)	1.4	1.5	1.6	1.6
Total Turnover Potential (£m)	23.8	31.9	33.3	35.1
Baseline Turnover of Existing Facilities (£m)	16.0	16.2	16.3	16.5
Residual Expenditure (£m)	**7.8**	**15.7**	**17.0**	**18.6**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**649**	**1,293**	**1,389**	**1,504**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above)
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

C1: Coleford

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	15.0	17.6	18.3	18.5
Market Share (%)	5.6	6.2	6.2	5.9
Expenditure Inflow (£m)	1.5	1.8	1.8	1.8
Total Turnover Potential (£m)	16.5	19.3	20.2	20.3
Baseline Turnover of Existing Facilities (£m)	15.1	15.2	15.4	15.6
Residual Expenditure (£m)	**1.4**	**4.1**	**4.8**	**4.7**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**120**	**336**	**388**	**384**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

C2: Coleford

Increase in Coleford's market share in Zone 2 to 90%

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	15.0	25.4	26.5	27.8
Market Share (%)	5.6	9.0	9.0	8.9
Expenditure Inflow (£m)	1.5	1.8	1.8	1.8
Total Turnover Potential (£m)	16.5	27.1	28.4	29.7
Baseline Turnover of Existing Facilities (£m)	15.1	15.2	15.4	15.6
Residual Expenditure (£m)	**1.4**	**11.9**	**13.0**	**14.1**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**120**	**980**	**1,059**	**1,142**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above)
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

D1: Newent

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	15.4	16.0	16.6	17.2
Market Share (%)	5.8	5.7	5.6	5.5
Expenditure Inflow (£m)	1.5	1.5	1.6	1.6
Total Turnover Potential (£m)	16.9	17.5	18.2	18.9
Baseline Turnover of Existing Facilities (£m)	10.2	10.4	10.5	10.6
Residual Expenditure (£m)	**6.6**	**7.2**	**7.7**	**8.3**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**553**	**591**	**631**	**671**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 15: CONVENIENCE GOODS CAPACITY 2011-2026

D2: Newent

Increase in Newent's market share in Zone 8 to 70%

	2011	2016	2021	2026
Available Convenience Goods Expenditure (£m)	267.0	281.1	295.3	312.6
Turnover from Study Area (£m)	15.4	24.3	25.4	26.4
Market Share (%)	5.8	8.6	8.6	8.5
Expenditure Inflow (£m)	1.5	1.5	1.6	1.6
Total Turnover Potential (£m)	16.9	25.8	27.0	28.1
Baseline Turnover of Existing Facilities (£m)	10.2	10.4	10.5	10.6
Residual Expenditure (£m)	**6.6**	**15.5**	**16.5**	**17.5**
Potential Sales Density for future convenience stores (£/sq m)	12,000	12120	12242	12365
Potential Floorspace Capacity (sq m)	**553**	**1,276**	**1,350**	**1,415**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Table 5.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above)
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
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 0.2% per annum over 2011-2026
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 0.2% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

A1: Lydney

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	14.5	16.9	20.3	24.2
Market Share (%)	3.5	3.4	3.4	3.4
Expenditure Inflow (£m)	2.5	2.9	3.4	4.1
Total Turnover Potential (£m)	16.9	19.7	23.7	28.4
Baseline Turnover of Existing Facilities (£m)	15.5	16.8	18.2	19.7
Residual Expenditure (£m)	**1.4**	**3.0**	**5.5**	**8.7**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**284**	**545**	**941**	**1,366**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

A2: Lydney

Increase in Lydney's market share in zone 1 to 30%

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	14.5	22.8	27.3	32.7
Market Share (%)	3.5	4.6	4.6	4.6
Expenditure Inflow (£m)	2.5	3.9	4.6	5.6
Total Turnover Potential (£m)	16.9	26.6	31.9	38.3
Baseline Turnover of Existing Facilities (£m)	15.5	16.8	18.2	19.7
Residual Expenditure (£m)	**1.4**	**9.9**	**13.7**	**18.6**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**284**	**1,820**	**2,338**	**2,934**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above).
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

B1: Cinderford

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	10.6	19.6	23.5	28.2
Market Share (%)	2.6	4.0	4.0	4.0
Expenditure Inflow (£m)	2.3	4.3	5.2	6.2
Total Turnover Potential (£m)	12.9	23.9	28.7	34.4
Baseline Turnover of Existing Facilities (£m)	12.5	13.5	14.6	15.8
Commitments (£m)	6.4	6.9	7.5	8.1
Residual Expenditure (£m)	**-5.9**	**3.5**	**6.5**	**10.5**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**-1,188**	**642**	**1,116**	**1,650**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

B2: Cinderford

Increase in Cinderford's market share in Zone 3 to 40%

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	10.6	23.9	28.7	34.5
Market Share (%)	2.6	4.9	4.9	4.8
Expenditure Inflow (£m)	2.3	5.3	6.3	7.6
Total Turnover Potential (£m)	12.9	29.2	35.0	42.1
Baseline Turnover of Existing Facilities (£m)	12.5	13.5	14.6	15.8
Commitments (£m)	6.4	6.9	7.5	8.1
Residual Expenditure (£m)	**-5.9**	**8.7**	**12.9**	**18.2**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**-1,188**	**1,611**	**2,199**	**2,861**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above).
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

C1: Coleford

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	6.9	7.7	9.2	10.9
Market Share (%)	1.7	1.6	1.6	1.5
Expenditure Inflow (£m)	2.3	2.5	3.0	3.6
Total Turnover Potential (£m)	9.2	10.2	12.2	14.5
Baseline Turnover of Existing Facilities (£m)	9.0	9.8	10.6	11.5
Residual Expenditure (£m)	**0.2**	**0.5**	**1.6**	**3.0**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**43**	**84**	**279**	**479**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

C2: Coleford

Increase in Coleford's market share in Zone 2 to 20%

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	6.9	11.1	13.2	15.8
Market Share (%)	1.7	2.3	2.2	2.2
Expenditure Inflow (£m)	2.3	3.7	4.4	5.2
Total Turnover Potential (£m)	9.2	14.7	17.5	21.0
Baseline Turnover of Existing Facilities (£m)	9.0	9.8	10.6	11.5
Residual Expenditure (£m)	**0.2**	**5.0**	**7.0**	**9.6**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**43**	**920**	**1,187**	**1,507**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above).
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

D1: Newent

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	5.7	6.8	8.1	9.6
Market Share (%)	1.4	1.4	1.4	1.3
Expenditure Inflow (£m)	2.4	2.8	3.3	3.9
Total Turnover Potential (£m)	8.1	9.6	11.4	13.5
Baseline Turnover of Existing Facilities (£m)	7.7	8.3	9.0	9.8
Residual Expenditure (£m)	**0.4**	**1.2**	**2.3**	**3.7**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**75**	**229**	**399**	**584**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 is assumed to remain constant.
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

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TABLE 16: COMPARISON GOODS CAPACITY 2011-2026

D2: Newent

Increase in Newent's market share in Zone 8 to 15%

	2011	2016	2021	2026
Available Comparison Goods Expenditure (£m)	409.4	491.6	589.5	711.8
Turnover from Study Area (£m)	5.7	10.2	12.1	14.5
Market Share (%)	1.4	2.1	2.0	2.0
Expenditure Inflow (£m)	2.4	4.2	4.9	5.9
Total Turnover Potential (£m)	8.1	14.4	17.0	20.4
Baseline Turnover of Existing Facilities (£m)	7.7	8.3	9.0	9.8
Residual Expenditure (£m)	**0.4**	**6.0**	**8.0**	**10.6**
Potential Sales Density for future comparison stores (£/sq m)	5,000	5413	5860	6344
Potential Floorspace Capacity (sq m)	**75**	**1,115**	**1,361**	**1,673**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Table 13.
Market share at 2011 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2011-2026 amended (see notes above).
Expenditure inflow based on predictions in 2008 Retail Study and latest information from South West Tourism.
Total turnover potential is the turnover from study area plus the expenditure inflow.
Baseline turnover at 2011 taken from data in 2008 Study and assumed to experience an increase in floorspace efficiency of 1.6% per annum over 2011-2026
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 1.6% per annum over 2011-2026.

2009 PRICES