

TABLE 1: CONVENIENCE GOODS IMPACT OF PROPOSED CONVENIENCE GOODS FLOORSPACE, 2020

	TURNOVER		DIVERSION	RESIDUAL TURNOVER	IMPACT
	2015	2020			
STROUD					
Town Centre					
Farmers Market, Stroud	£1.63	£1.63	£0.05	£1.58	-3.1%
Home Bargains, Merrywalks Centre, Stroud	£0.10	£0.10	£0.00	£0.09	-2.7%
Stroud town centre	£0.93	£0.93	£0.02	£0.91	-2.5%
Iceland, Union Street, Cornhill, Stroud	£1.39	£1.39	£0.05	£1.34	-3.9%
Sunshine Deli, Bedford Street, Stroud	£0.35	£0.35	£0.01	£0.34	-3.8%
Walkers the Bakers, Kendrick Street, Stroud	£0.23	£0.23	£0.01	£0.22	-3.9%
Wilkinsons, Merrywalks Centre, Stroud	£0.19	£0.19	£0.01	£0.18	-4.2%
Sub-total	£4.82	£4.82	£0.16	£4.66	-3.3%
Outside town centre					
B&P Petrol Station, London Road, Stroud	£0.13	£0.13	£0.00	£0.13	-2.6%
Co-op, Cashes Green Road, Cainscross	£2.15	£2.15	£0.05	£2.10	-2.5%
Co-op, Slad Road, Stroud	£1.73	£1.73	£0.05	£1.68	-2.8%
Sainsbury's, Dudbridge, Stroud	£35.44	£35.44	£3.00	£32.44	-8.5%
Tesco Express, Stratford Road, Paganhill	£0.40	£0.40	£0.01	£0.39	-2.7%
Tesco Superstore, Stratford Road, Stroud	£32.92	£32.92	£2.75	£30.18	-8.3%
Waitrose, London Road, Stroud	£28.08	£28.08	£2.27	£25.81	-8.1%
Ebly	£0.16	£0.16	£0.00	£0.15	-2.8%
Sub-total - Stroud	£105.83	£105.83	£8.29	£97.54	-7.8%
CAM					
Town Centre					
Tesco Superstore, High Street, Cam, Dursley	£19.23	£19.23	£0.03	£19.20	-0.2%
Cam town centre	£0.08	£0.08	£0.00	£0.08	-1.0%
Sub-total	£19.31	£19.31	£0.03	£19.28	-0.2%
Outside town centre					
Spar, Mill Garage, Cam, Dursley	£0.14	£0.14	£0.00	£0.13	-1.0%
Sub-total Cam	£19.45	£19.45	£0.04	£19.41	-0.2%
DURSLEY					
Town Centre					
Bramleys, Parsonage Street, Dursley	£0.06	£0.06	£0.00	£0.06	-1.0%
Iceland, Parsonage Street, Dursley	£1.58	£1.58	£0.02	£1.57	-1.1%
J Broomhall, Parsonage St, Dursley	£0.05	£0.05	£0.00	£0.05	-1.0%
Sainsbury's, Castle Street, Dursley	£14.86	£14.86	£0.02	£14.83	-0.2%
Dursley	£0.21	£0.21	£0.00	£0.21	-0.8%
Sub-total	£16.76	£16.76	£0.04	£16.71	-0.3%
Outside town centre					
Co-op, Roseberry Road, Dursley	£0.33	£0.33	£0.00	£0.32	-1.0%
Lidl, Kingshill Road, Dursley	£5.84	£5.84	£0.06	£5.78	-1.0%
One Stop, Phillimore Road, Woodfield, Dursley	£0.69	£0.69	£0.01	£0.69	-1.0%
Sub-total Dursley	£23.62	£23.62	£0.11	£23.51	-0.5%
WOTTON					
Town Centre					
Co-op, Long Street, Wotton Under Edge	£7.26	£7.26	£0.04	£7.22	-0.6%
Wotton Under Edge town centre	£0.66	£0.66	£0.00	£0.65	-0.6%
Tesco Express, Long Street, Wotton Under Edge	£1.46	£1.46	£0.01	£1.45	-0.8%
The Harvest Store, Long Street	£0.05	£0.05	£0.00	£0.05	-1.0%
Sub-total	£9.43	£9.43	£0.06	£9.37	-0.6%
Outside town centre					
Wotton Farm Shop, Bradley Road	£0.13	£0.13	£0.00	£0.13	-1.0%
Sub-total Wotton	£9.55	£9.56	£0.06	£9.50	-0.6%
NAILSWORTH					
Town Centre					
Balleys News, Old Market, Nailsworth	£0.03	£0.03	£0.00	£0.03	-5.7%
Co-op, The Old Market, Nailsworth	£1.59	£1.59	£0.08	£1.52	-4.7%
Country Quality Meat, Old Market, Nailsworth	£0.07	£0.07	£0.00	£0.07	-5.3%
Bramleys, Mill Yard, Nailsworth	£0.23	£0.23	£0.01	£0.22	-4.2%
Green Spirit, Old Clothiers Arms, Market Street, Nailsworth	£0.05	£0.05	£0.00	£0.05	-5.7%
Nailsworth	£0.38	£0.38	£0.01	£0.36	-3.4%
Tesco Express, Old Market, Nailsworth	£0.91	£0.91	£0.04	£0.87	-4.3%
Morrisons, George Street, Nailsworth	£17.21	£17.21	£1.10	£17.11	-0.6%
Hobbs House Bakery, George Street, Nailsworth	£0.26	£0.26	£0.01	£0.25	-3.3%
Leonard Walker Butchers, George Street, Nailsworth	£0.03	£0.03	£0.00	£0.03	-5.7%
Walkers the Bakers, Wheelwrights Corner, Old Market	£0.41	£0.41	£0.01	£0.39	-3.1%
Shiny Goodness, Fountain Street, Nailsworth	£0.03	£0.03	£0.00	£0.03	-5.7%
William's Fish Market & Food Hall, Fountain Street	£0.19	£0.19	£0.01	£0.18	-3.3%
Sub-total Nailsworth	£21.38	£21.38	£0.28	£21.10	-1.3%
STONEHOUSE					
Town centre					
Co-op, Elm Road, Stonehouse	£0.61	£0.61	£0.02	£0.58	-3.5%
Co-op, High Street, Stonehouse	£6.96	£6.96	£0.31	£6.65	-4.5%
J Broomhall, High Street, Stonehouse	£0.09	£0.09	£0.00	£0.09	-0.4%
Stonehouse town centre	£0.37	£0.37	£0.00	£0.37	-0.3%
Sub-total	£8.02	£8.02	£0.33	£7.69	-4.2%
Outside town centre					
Londis, Park Parade, Stonehouse	£0.06	£0.06	£0.00	£0.06	-0.4%
Sub-total Stonehouse	£8.08	£8.08	£0.33	£7.75	-4.1%
BERKLEY					
Town Centre					
Co-op, Salter Street, Berkeley	£2.19	£2.19	£0.03	£2.17	-1.3%
Berkeley	£0.56	£0.56	£0.01	£0.55	-1.3%
Sub-total Berkeley	£2.75	£2.75	£0.04	£2.71	-1.3%
MINCHINHAMPTON					
Town Centre					
L Taylor & Sons, West End, Minchinhampton	£0.38	£0.38	£0.01	£0.37	-3.0%
M & B Stores, High Street, Minchinhampton	£0.80	£0.80	£0.03	£0.77	-3.5%
Minchinhampton	£0.26	£0.26	£0.01	£0.25	-3.3%
Woolfudane Organic Dairy, Market Square, Minchinhampton	£0.28	£0.28	£0.01	£0.27	-3.3%
Sub-total Minchinhampton	£1.71	£1.71	£0.06	£1.65	-3.3%
CHALFORD					
Town Centre					
Chalford Community Stores, High Street, Chalford	£0.09	£0.09	£0.00	£0.09	-3.6%
PAINSWICK					
Town Centre					
Best One, St Marys Street, Painswick	£0.27	£0.27	£0.01	£0.27	-3.1%
Painswick	£0.18	£0.18	£0.01	£0.18	-3.1%
Sub-total Painswick	£0.46	£0.46	£0.01	£0.44	-3.1%
OTHER STORES IN STROUD DISTRICT					
Town Centre					
Co-op, High Street, Kings Stanley	£1.20	£1.20	£0.06	£1.15	-4.8%
OUTSIDE DISTRICT					
Town Centre					
Sub-total					
			£0.56		

Notes:
Pre-impact turnover levels based on market share and population data from Retail Study Update plus updated expenditure forecasts from Experian.
Trade diversion is Bllinger GVA estimates.

TABLE 2: IMPACT OF PROPOSED COMPARISON GOODS FLOORSPACE, 2020

	TURNOVER 2015	2020	DIVERSION	RESIDUAL TURNOVER	IMPACT
STROUD		£125.4	£0.8	£124.6	-0.7%
Stroud Town Centre		£97.1	£0.6	£96.5	-0.7%
CAM		£9.7	£0.0	£9.7	-0.2%
DURSLEY		£7.4	£0.0	£7.4	-0.1%
WOTTON		£4.5	£0.0	£4.4	-0.1%
NAILSWORTH		£17.1	£0.1	£17.1	-0.4%
STONEHOUSE		£8.8	£0.0	£8.8	-0.2%
Stonehouse Town Centre		£8.8	£0.0	£8.7	-0.2%
OTHER STROUD DISTRICT		£10.2	£0.0	£10.2	
OUTSIDE DISTRICT (and commitments)		£543.0	£1.2	£541.9	

Notes:

Pre-impact turnover estimates based on market share and population data from Retail Study Update and recent retail expenditure forecasts from Experian.
Trade diversion is Bilfinger GVA estimates.

TABLE 3: TOTAL IMPACT OF BATH ROAD PROPOSAL, 2020

	TURNOVER		DIVERSION	RESIDUAL TURNOVER	IMPACT
	2015	2020			
STROUD					
GVA Turnover Levels					
Convenience		£4.8	£0.2	£4.7	-3.3%
Comparison		£97.1	£0.6	£96.5	-0.7%
Total		£101.9	£0.8	£101.1	-0.8%
HOW Turnover Levels					
Convenience		£4.8	£0.2	£4.7	-3.3%
Comparison		£73.4	£0.6	£72.8	-0.9%
Total		£78.2	£0.8	£77.4	-1.0%
STONEHOUSE					
GVA Turnover Levels					
Convenience		£8.0	£0.3	£7.7	-4.2%
Comparison		£8.8	£0.0	£8.7	-0.2%
Total		£16.8	£0.4	£16.4	-2.1%
HOW Turnover Levels					
Convenience		£8.0	£0.3	£7.7	-4.2%
Comparison		£8.0	£0.0	£8.0	-0.2%
Total		£16.0	£0.4	£15.7	-2.2%
Nailsworth					
Convenience		£21.4	£0.3	£21.1	-1.3%
Comparison		£17.1	£0.1	£17.1	-0.4%
Total		£38.5	£0.3	£38.2	-0.9%

Notes:

Bilfinger GVA pre-impact turnover levels taken from Tables 1 and 2.

HOW pre-impact turnover levels for comparison goods in Stroud and Stonehouse taken from HOW financial impact assessment.

Trade diversion levels taken from Tables 1 and 2.