Retail & Town Centres Study (Part 1)

Gloucester, Cheltenham and Tewkesbury

Strategic & Local Plan

ON BEHALF OF GLOUCESTER CITY COUNCIL, CHELTENHAM BOROUGH COUNCIL AND TEWKESBURY BOROUGH COUNCIL

October 2025

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1. Introduction

1.1 This Retail and Town Centres Study ('the Study') has been prepared by Nexus Planning ('Nexus') for Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council (hereafter referred to as 'the Councils'). It is intended that the Study will provide up to date evidence base information for the Strategic & Local Plan ('SLP') which is being prepared by the Councils as the main overarching planning strategy and cross-boundary strategic planning policies document for Gloucester, Cheltenham and Tewkesbury.

1.2 The SLP, when adopted, is intended to replace the Gloucester, Cheltenham and Tewkesbury Joint Core Strategy 2011-2031 ('the JCS'). It will, amongst other things, set out a vision, strategy and policies for how the Gloucester, Cheltenham and Tewkesbury area will grow, setting out the requirements for the delivery of new homes, jobs and infrastructure to meet the needs of the local community and local economy. Part of the spatial strategy within the SLP will be in relation to the main 'town centres' across the Gloucester, Cheltenham and Tewkesbury administrative areas. It is intended that the 'town centres' strategy will define a network of centres that meet the needs of the local communities, which will also include planning for new centres to meet the needs of new and expanding communities.

1.3 Preparation of the SLP has commenced, with an Issues and Options Consultation on spatial options and key policy areas taking place from January until March 2024. The Issues and Options consultation (also known as 'the Regulation 18 consultation'), which is described in more detail in Section 2 of this document, explored a number of different issues and priorities for the SLP, including a draft vision and strategic objectives, planning for homes, business and retail/town centres, along with six development scenarios.

1.4 The next formal stage of consultation, which will be the Regulation 19 consultation, is planned to commence in Spring 2026. Prior to the Regulation 19 consultation the SLP team are undertaking various strands of assessment work in order to progress the draft strategic development options along with the approach to key land use sectors and themes. In order to inform this work, this Study has been commissioned to provide the following evidence base information and assessment work in relation to the following topics:

Part 1

a. A review of the background context to retail, commercial leisure and town centre land use issues, including recent trends and current commercial market sector characteristics which will influence how the SLP plans for retail land use provision and the main 'town centres' in Gloucester, Tewkesbury and Cheltenham.

b. A review of the main issues surrounding the health, role and function of the main 'town centres' in the SLP area, along with issues associated with the hierarchy of centres.

c. The provision of information regarding current spending patterns on retail and leisure uses across the SLP area.

Part 2

d. An assessment of the need for retail and food/beverage floorspace/uses across the SLP area, based upon quantitative and qualitative indicators and forecasts.

e. Having undertaken the assessments of need, existing retail provision, current spending patterns and town centre health, Part 2 of the Study will provide an assessment of how best to meet identified needs and tackle issues associated with retail and main 'town centre' land use provision.

f. Advice and recommendations for strategic planning policy surrounding 'town centres' in the SLP area, along with the content of development management policies which will deal with main 'town centre' land use proposals within and outside of defined 'town centres'.

1.5 The preparation of this Study follows the publication of a previous evidence base study on retail and town centre issues: the Retail and City / Town Centre Review (prepared by Avison Young and published in March 2021) ('the 2021 Retail Study'). The 2021 Retail Study covered a similar set of issues as is intended for this current Study and its contents will be helpful in providing general background context for the latest assessments of town centres, spending patterns, and the assessment of need for retail floorspace. It should be noted that a large part of the 2021 Study was undertaken during the height of the Covid-19 pandemic. As a consequence, the results of the 2021 Study should be read and understood with that period of recent history in mind.

1.6 The preparation of this current Study has been guided by the contents of the current version of the National Planning Policy Framework ('NPPF') published in December 2024[1] and, in particular, paragraph 90 (NPPF - 7. Ensuring the vitality of town centres). In addition, account has been taken of the contents of the Planning Practice Guidance ('PPG') which provides support for national planning policy on plan-making and decision-taking issues (PPG - Town centres and retail).

1.7 Given the stage of preparation of the SLP, it has been agreed that the overall content of this Study will be split into two parts, as outlined in paragraph 1.4 above. The content of this Part 1 document focuses upon baseline evidence around general retail, leisure and town centre trends, land use trends in the main 'town centres' in the SLP area and retail and food/beverage spending information, along with an analysis of the catchment areas for the main 'town centres' and out of centre retail destinations in the SLP area.

1.8 It is anticipated that preparation of Part 2 of the Study will occur alongside the preparation of the spatial strategy for the Regulation 19 stage of the SLP. Part 2 of the Study will include assessments of need for retail floorspace provision across the SLP area and will be informed by the draft (Regulation.19) strategy for the scale and distribution of new residential and employment development[2]. Part 2 will also include an assessment as to how best to plan for retail floorspace provision, alongside a series of recommendations for the retail and town centre land use strategy for the SLP.

1.9 As part of the assessment of the topics outlined in paragraph 1.4 above, a wide range of data has been collected during the course of preparing this Study. This has included obtaining data on spending patterns across retail and leisure facilities in the SLP area using evidence provided by Experian. This data has helped the Study understand the extent of the shopping and leisure catchments for the main 'town centres' along with out of centre provision and the market share of each settlement. In addition, land use data for the main 'town centres' has also been collected in order to provide an up-to-date picture on the diversity of land uses in each of the main locations in the centre hierarchy and to ensure an assessment of how this picture has changed over the past several years.

1.10 Preparation of this Study has been informed by an on-going dialogue with key stakeholders who have an interest in retail, leisure and town centre related issues across the SLP area. This has included: the Business Improvement District ('BID') teams in Cheltenham and Gloucester and the Gloucestershire Retail & Hospitality Group[3]. It is intended that this Study will be part of an ongoing conversation with key stakeholders and the wider local community around key 'town centre'

[1] And updated in February 2025
[2] As part of the assessment of quantitative need for retail and food/beverage floorspace within Part 2 of the Study, assessment work will be carried out to forecast future turnover levels for the main retail and town centre destinations in the SLP area, which will take into account the growth and distribution of new housing development in the SLP preferred spatial strategy. This assessment will also consider and compare the current turnover of the main grocery retail stores in the SLP area against benchmark turnover levels.
[3] Led by Gloucestershire County Council

and retail issues in the SLP area, which will be continued by a Retail & Town Centres Topic Paper[4] (which is intended to be published alongside this Part 1 Study) and the future Regulation 19 consultation.

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

a. Section 2 provides a review of the background and context to the main 'town centres' and retailing issues in Gloucester, Cheltenham and Tewkesbury, including a summary of the previous stage of consultation on the SLP insofar as it relates to retail and town centre issues. Section 2 also provides a review of current national planning policy for retail and main town centre uses, along with recent legislative changes.

b. In order to provide up-to-date evidence base data for the SLP, Section 3 provides a review of retail, leisure and town centre trends, including how the environment for retail and 'town centre' land use issues has evolved in recent years since the preparation of the 2021 Retail Study and the JCS.

c. In order to support the 'town centres' and retail land use strategy in the SLP, Section 4 addresses a series of key 'town centre' issues including: the diversity of retail and leisure land uses, spending patterns and catchment area, recent and current investment projects, along with potential future proposals. In addition, this section provides a review of recent changes in retail and leisure land use provision outside of defined 'town centres' across the SLP area.

d. Finally, Section 5 provides a summary of the content and findings of Part 1 of the Study.

1.12 All plans and other documents referred to in the main text of this report are contained in appendices.

[4] To be published by the SLP team

2. Background & Context Issues

Introduction

2.1 In order to provide context for this Study and the forthcoming Regulation 19 consultation, it is helpful to provide a brief review of main background and context issues for 'town centre' and retail planning issues across the SLP area. In particular, this context section provides:

a. A review of local planning policy towards town centre and retail issues, including existing adopted plans and the content of the recent Regulation 18 SLP consultation.

b. A summary of the main findings of the 2021 Study regarding retail and town centre issues across Gloucester, Cheltenham and Tewkesbury.

c. A brief summary of current national planning policy (and guidance) regarding main town centre uses, along with salient parts of the ongoing reform of the planning system.

2.2 Each aspect is discussed in turn below.

Planning Policy and Evidence Base Information for Retailing and 'Town Centre' Issues in Gloucester, Cheltenham & Tewkesbury

Policy

2.3 At the present time, there are six documents which have an influence over retail and main town centre land use provision across the SLP area. These are:

a. The Gloucester, Cheltenham and Tewkesbury Joint Core Strategy 2011-2031 (adopted December 2017) ('the JCS');

b. The three adopted Local Plans in Gloucester, Cheltenham and Tewkesbury:

1. Gloucester City Plan 2011-2031 (adopted January 2023), along with the saved retail policies from the City of Gloucester Local Plan (1983)
2. Cheltenham Borough Plan (adopted July 2020), along with the saved retail policies from the Cheltenham Local Plan Second Review 2006
3. Tewkesbury Borough Plan 2011-2031 (adopted June 2022)

The JCS

2.4 The JCS provides the overarching land use planning strategy for the Gloucester, Cheltenham and Tewkesbury area. It sets the spatial development strategy and provides the apportionment of strategic allocation sites.

2.5 Policy SD2 of the JCS focuses upon retail land use issues and the main 'town centres' across the Gloucester, Cheltenham and Tewkesbury area. Part 1 of the of the policy outlines the hierarchy of centres, which is split into three tiers:

1. Key Urban Areas: Cheltenham and Gloucester
2. Market Town: Tewkesbury
3. Rural Service Centres: Winchcombe and Bishop's Cleeve

2.6 Part 5 of the policy outlines the four key principles which will be drawn upon in the determination of planning applications within the main 'town centres'. These focus upon:

1. Encouraging a range of uses (retail, leisure, culture, tourism, office, and community uses) which contribute to the health of the town centres.
2. Encouraging a scale of development which is appropriate to the role and function of the main centres.
3. Encouraging proposals which help to deliver the regeneration strategies of Gloucester city centre, along with Cheltenham and Tewkesbury town centres.
4. Providing new local centres of an appropriate scale to meet the needs of new communities within the identified strategic allocations.

2.7 Bearing in mind the date of adoption of the JCS (December 2017), Part 2 of Policy SD2 intended to rely upon the retail policies of the saved Cheltenham and Tewkesbury Local Plan documents. This part of the policy notes that the saved Cheltenham and Tewkesbury policies will be reviewed and taken forward through a review of the JCS retail policy, although policies in the Tewkesbury Borough Plan have subsequently replaced all of the saved policies in the 2006 Tewkesbury Local Plan.

2.8 The retail policies in the City of Gloucester Local Plan (1983) are saved but Part 3 of JCS Policy SD2 defines the city centre boundary, primary shopping area and shopping frontage boundaries for Gloucester city centre. Alongside these definitions, Part 3 of SD2 provides a development management framework (additional to the saved policies in the 1983 Plan) in order to assess development proposals within the different parts of the city centre.

2.9 Part 4 of SD2 outlines the convenience and comparison goods retail floorspace requirements for the five main settlements at 2021, 2026 and 2031. It is understood that these requirements are based purely on the quantitative assessments undertaken as part of the JCS evidence base.

2.10 Part 6 of the policy deals with proposals for retail and other main town centre land uses that are not located in designated centres. It indicates that they will be assessed against the requirements of national planning policy and guidance, or locally defined impact assessment thresholds as appropriate. Policy SD2 does not set its own locally defined impact assessment threshold and none of the Local Plan documents have their own locally set threshold.

2.11 Finally, Part 7 of SD2 notes that this policy will be subject to an immediate review which will take two years to complete. The review, which has not occurred, was intended to cover strategic planning matters relating to the assessment of retail needs, site allocations, the definition of primary and secondary shopping frontages and locally defined impact thresholds.

The Gloucester City Plan

2.12 The Gloucester City Plan (2023) does not contain any planning policies specifically dealing with retail land uses and instead relies upon saved retail policies in the City of Gloucester Local Plan (1983) and the content of the JCS to guide and manage retail development proposals within the city. The City Plan does not outline a formal 'town centre' hierarchy for the city; the only formally defined 'town centre' in the city is Gloucester city centre as defined by Policy SD2 of the JCS. Gloucester council have also been working on defining the locations of local and district centres within the administrative boundary and the locations of these can be found within the published SLP City / Town / Local Centres Topic Paper (2025).

The Cheltenham Borough Plan

2.13 The Cheltenham Borough Plan does not include any specific policies dealing with retail and main town centre land use planning matters. Therefore, retail and main town centre land use proposals in Cheltenham Borough will be assessed against policies in the JCS and policies saved from the 2006 Cheltenham Borough Local Plan ('the 2006 Cheltenham Plan'). In relation to retail and town centre land use issues, these six saved policies include:

a. RT1: location of retail development

b. RT2: retail development in the Core Commercial Area

c. RT3: non-A1 uses in Primary Shopping Frontages

d. RT4: retail development in Local Shopping Centres

e. RT5: non-A1 uses in Local Shopping Centres

f. RT8: individual convenience shops

2.14 The policies map supporting the Cheltenham Plan and the saved policies from the 2006 Local Plan, show the extent of Cheltenham town centre, along with the three district centres[5] and various smaller neighbourhood centres. In relation to Cheltenham town centre and the surrounding area, there are separate designations for: (a) the overall commercial area; (b) primary shopping frontages; (c) central shopping area; (d) Lower High Street shopping area; and (e) the Montpellier shopping area.

The Tewkesbury Borough Plan

2.15 Section 6 of the Tewkesbury Borough Plan deals with 'town centres' and retail land use issues and provides a series of nine separate policies dealing with: (a) the hierarchy of centres in the Borough; (b) the assessment framework for proposals located within defined town centre and primary frontage areas; (c) out of centre development proposals; (d) hot food take-aways; (e) local shops and public houses; and (f) agricultural/horticultural related retail uses in the countryside.

2.16 In relation to the formal 'town centre' hierarchy in Tewkesbury Borough, Policy RET1 outlines three tiers. Tewkesbury town centre is classified as the only 'Market Town', with Bishop's Cleeve and Winchcombe classified as 'Service Centres'. There are several identified existing and planned new 'Local Centres'. Existing 'Local Centres' are Brockworth, Churchdown, Coopers Edge, Innsworth and Northway[6].

2.17 There are five planned new 'Local Centres' in the Tewkesbury hierarchy all of which are located within the strategic residential-led allocations in the JCS, including: Innsworth and Twigworth, South Churchdown, North Brockworth, North West Cheltenham, plus West Cheltenham. At the time of preparing this Part 1 report, the latest position regarding these areas and their planned new centres is as follows:

a. North West Cheltenham. Tewkesbury Borough Council (TBC) has resolved to grant outline planning permission for the element of this development within Tewkesbury Borough, which will include a large new district centre[7].

[5] Caernarvon Road, Coronation Square, Bath Road
[6] The five existing local centres, along with the Service Centres and Market Town designations are shown on the Tewkesbury Borough Plan policies map. The precise location and extent of the planned <u>new</u> local centres are not shown.
[7] Part of the North West Cheltenham site (which is also known as Elms Park) also lies within the Cheltenham Borough administrative area. CBC has also resolved to grant outline planning permission for this development.

b. West Cheltenham. At the present time there is an undetermined outline planning application[8] for a residential-led mixed use development within the Tewkesbury Borough element of the West Cheltenham allocation[9]. This application includes provision for up to 1,000sq m of Class E, F1 and F2 land use floorspace.

c. South Churchdown. Whilst the Tewkesbury Borough Plan allows for a local centre to be provided within this area[10], the two main planning permissions for this area do not include provision for any retail and / or main town centre land uses.

d. North Brockworth. This allocation is subject to an outline planning permission, granted in March 2016, for up to 1,500 dwellings and non-residential uses (including up to 2,500sq m of former Class A uses). At the time of preparing this document, reserved matters for the retail and town centre elements of this permission have not come forward.

e. Twigworth. Outline planning permission was granted (at appeal) for a mixed-use development on land to the east of the A38. The local centre element of the permission has now been provided and includes a Co-op convenience store, along with a parade of small commercial units.

f. Innsworth. Outline planning permission has been granted for a residential-led mixed use development. The implementation of this permission is well underway, although the local centre element has yet to come forward. The outline planning permission allows for a range of former Class A uses, with floorspace of up to 2,500sq m gross (including an allowance for one large unit of up to 2,000sq m gross).

Evidence Base

2.18 Following the adoption of the JCS, the three SLP Councils commissioned the 2021 Retail Study. As set out in Section 1, this study covered a wide range of issues relating to 'town centre' health, the need for retail floorspace across the three local authority areas and advice on suitable retail and town centre planning policies for incorporation into future development plan documents.

2.19 The recommended retail strategy, in the 2021 Retail Study for Cheltenham, Gloucester and Tewkesbury was as follows:

a. Cheltenham:

> *"There is no requirement to allocate any sites/locations for any additional comparison goods retail floorspace in Cheltenham and that new retail proposals (outside of defined 'town centres') are closely examined in terms of their impact.*
>
> *There is the capacity for some additional convenience goods floorspace in Cheltenham. The focus for this should be in the town centre and new local centres within the planned urban extensions. One centre is already included within the adopted JCS for North West Cheltenham and any further new large residential allocations should also be considered for retail, taking into account the criteria outlined in this report. We also recommend that the allocated West Cheltenham allocation is considered for retail floorspace due to the size of the planned development and level of existing provision in this part of Cheltenham.*
>
> *Beyond the retail sector, Cheltenham town centre has a good and varied set of other uses appropriate to a town centre, including commercial leisure, arts, cultural, food/beverage and hotel uses. These provide the town centre with resilience and are important if Cheltenham is to maintain its vitality and viability. Other assets include existing office uses such as the*

[8] 22/01107/OUT
[9] There are also separate planning applications, submitted to CBC, for mixed use development within the Cheltenham Borough elements of the West Cheltenham strategic allocation area. One of these applications, which contains a significant amount of retail and main town centre land use floorspace, has received a resolution to grant (outline) planning permission.
[10] A land use strategy for this area which mirrors the allocation of South Churchdown in the JCS.

Borough Council offices on the Promenade. We consider that such uses should remain a significant part of the land use mix in the town centre as, apart from their obvious economic benefits, they can increase footfall through different times of the day".

b. Gloucester:

"The focus for the retail and town centre strategy in Gloucester should therefore be on a stricter control on proposals for retail development outside of defined town centres. Given the change which has occurred in Gloucester over the past 10-15 years, the strategy should acknowledge the benefits to the city of the current Gloucester Quays retail outlet centre, due to its ability to attract visitors to the city which may not have otherwise come, but also show that further out of centre retail and leisure development has the very real potential to be harmful.

We therefore recommend that the retail and leisure strategy for the primary shopping area and the Quays should be complementary. Both locations have the ability to make positive contributions to the health and attractiveness of the city but they must find their own individual role. This will require careful management by the city council and whilst it is proposed that the Quays remains within the city centre boundary, planning applications for main town centre uses will still be required to be assessed against the sequential test4 (as it lies outside of the recommended primary shopping area).

The St Oswalds, the Peel Centre and Westgate Island out of centre retail parks also lie reasonably close to the primary shopping area and thus have the potential to provide positive impacts on the centre in a way in which other out of centre retail provision (at, say, Eastern Avenue) cannot. Linkages with the primary shopping area will, however, need to be improved as part of future development proposals although we consider that these three areas should be identified in the strategy as 'inner ring' locations, which are out-of-centre and placed third in the sequence after the primary shopping area, and edge of centre locations for future retail and leisure development.

In relation to other areas surrounding the city centre, improvements to the railway station in the transport hub will also make the city centre more attractive for visits via public transport and making the centre attractive for rail users. There is also the potential benefit of the hospital which has a large workforce and attracts many visitors. If linkages can be improved then this will also make a positive contribution to the city centre. Gloucester city centre is the centre in the JCS area which is likely to require greatest diversification. The City Council should adopt a 'curator' role in terms of both the ownership and management of property,

The strategy in the JCS should set out the aspirations for each area and how each, particularly the traditional part of the city centre / primary shopping area / Westgate Street, is to evolve over the JCS Review period. As part of this position, the strategy for the traditional part of the city centre (i.e. existing primary shopping area) should be to aim for diversification, with a lower focus on traditional retail space and a greater focus on residential and leisure uses. This will require a more flexible approach to the land use mix in certain parts of the city centre, aided by changes to the defined primary shopping area and the identification of priority areas such as Westgate Street".

And:

"The JCS should set out the above in a strong and robust vision for the city centre which will guide development activity and also be a very useful part of the development plan strategy when the City Council is faced with proposals associated with out of centre retail and leisure floorspace. The strategy will also set out the role and contribution that the three 'third choice' 'inner ring' of retail and leisure locations – St Oswalds, the Quays/Docks and Westgate Island – which can play a positive role in complementing the city centre and encouraging linked trips (possibly including the need for enhanced linkages)".

c. Tewkesbury:

"With the future potential construction of the new retail outlet centre at Ashchurch, Tewkesbury town centre has the potential to experience future change and pressures in the coming years and there is concern that its comparison goods and food/beverage functions could face renewed pressure.

With regards to the need for retail floorspace, we found no requirement for net additional convenience goods floorspace although there is a strong case for a modest amount of new provision within the Tewkesbury Garden Town project in order to provide easily accessible quality provision to the east of the M5, to provide for the needs of new communities.

For comparison goods retailing the new retail outlet centre at Ashchurch will provide a significant change in the type and level of provision in the local area. We recommend that the JCS Review does not plan for any significant net additional comparison goods floorspace and, instead, the JCS authorities monitor how the health of Tewkesbury town centre fares 2-3 years after the opening of the outlet centre.

The two main town centre sites which can provide a modest amount of retail floorspace are Healings Mill and Spring Gardens. Healings Mill has the potential to offer a waterside development which can offer a new dimension to the town centre, possibly in the way that the Docks area has developed in Gloucester. It is likely that provision here will be focused on food and beverage uses with a small amount of traditional retailing.

The redevelopment potential of Spring Gardens has been discussed for the past several years following the departure of the leisure centre. Retail-led masterplans have not been progressed and the latest work for the borough council is now considering a wider mix of uses including residential".

National Planning Policy, Guidance & Legislation

National Planning Policy

2.20 The new version of the NPPF was published in December 2024. This latest version provides a clear statement of the new Labour government intended approach to the planning system, with a particular focus around its objective of delivering 1.5 million new homes by the end of the current Parliament (in 2029).

2.21 The main section of the NPPF which deals with retail and town centre planning policy matters is Section 7: ensuring the vitality of town centres. No changes were made to this section between the 2023 and 2024 versions and the general content of national policy towards retail and town centres has remain relatively unchanged over recent years. The 2021 Study provided a summary of the key changes which had occurred between the original 2012 version of the NPPF (which was in place at the time of the 2016 Study) and 2019 & 2021, although for the purposes of this latest Study it is worth re-iterating that:

a. Paragraph 90 asks that planning policies in development plans should:

"a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be *identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and*

f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites".

b. In relation to development management issues, the two policy tests are the sequential and impact tests.

1. Paragraphs 91 and 92 note, in relation to the sequential test, that:

"*Local planning authorities should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.*

When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored".

2. Paragraph 94, in relation to impact assessments, notes that:

"When assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500sq m of gross floorspace). This should include assessment of:
a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme)".

2.22 Beyond Section 7 the only other change in the December 2024 version of the NPPF which directly relates to main town centre land uses is the inclusion of a new paragraph, No.97 (in Section 8), which relates to hot food take-away and fast-food outlets. It notes:

"Local planning authorities should refuse applications for hot food takeaways and fast food outlets:

a) within walking distance of schools and other places where children and young people congregate, unless the location is within a designated town centre; or

b) in locations where there is evidence that a concentration of such uses is having an adverse impact on local health, pollution or anti-social-behaviour".

2.23 Whilst many of the changes within the latest version of the NPPF do not directly relate to town centre issues, some of the changes will have a large indirect impact upon planning for town centres and main town centre uses (including retail). This will include those changes which relate to housing need / supply. Whilst the need to plan for population growth and housing needs has long been a key influence on retail and main town centre land use needs assessments, the increasing focus upon boosting the supply of homes reinforces the requirement to ensure that development plans make provision for shops, services and other facilities which meet the day to day needs of new and growing local communities. These issues are a key influence on our assessment of planning for retail and town centre provision in Part 2 of this Study.

Current Reforms to the National Planning System

2.24 Following the publication of the new NPPF, the government is now moving forwards with reform of other parts of the planning system. Some key recent and forthcoming events include:

a. The introduction of a new Planning and Infrastructure Bill ('PIB'), alongside a new Devolution Bill. Amongst other areas, the PIB, which is working its way through Parliament, intends to reform the planning committee system, introducing new mechanisms for cross-boundary strategic planning, along with reforms to the infrastructure planning process.

b. The potential introduction of National Development Management Policies ('NDMPs') was originally raised by the previous Conservative government and this particular initiative has been retained by the present government. Further announcements regarding the NDMPs are expected later in 2025. Should NDMPs be introduced, it is expected that the NPPF would become a slimmed-down document which focus upon plan-making issues. NDMPs would also allow development plans to be more concise, focusing upon local specific policies, which would have implications for the content of the SLP.

c. Following the publication of the Licensing Taskforce Report, the Department for Business & Trade indicated, in Summer 2025, that it would accept the recommendation to create a National Licencing Policy Framework, along with an indication that the government will explore the introduction of hospitality / night-time economy zones (and the role that the planning system could play in this initiative).

d. The Plan for Change legislation (announced on 25th September 2025) which empowers communities with new rights to buy local assets, block nuisance businesses, and compel regeneration of derelict sites. Backed by a £5 billion Pride in Place programme, it aims to restore pride, improve public spaces, and devolve decision-making to local residents.

Planning Practice Guidance

2.25 National policy contained within the NPPF is supported by the contents of the Planning Practice Guidance ('PPG') which is intended to assist with the preparation of development plans and the determination of planning applications. One of the main sections of the PPG covers a range of land use planning issues for town centres and retail uses, including: (a) planning for town centre vitality and viability; (b) permitted development and change of use in town centres; and (c) assessing proposals for edge and out of centre development. Those parts of the PPG which are relevant to the scope and objectives of this Study are summarised later in this document.

3. Retail & Town Centre Trends

Introduction

3.1 A key part of building the background context for this Study is an examination of retail, leisure and town centre trends. Like any land use sector, economic and commercial market trends, along with external factors, will have an influence on how a local authority will plan for individual land uses and how it will develop strategic planning policies to guide development and other regeneration initiatives.

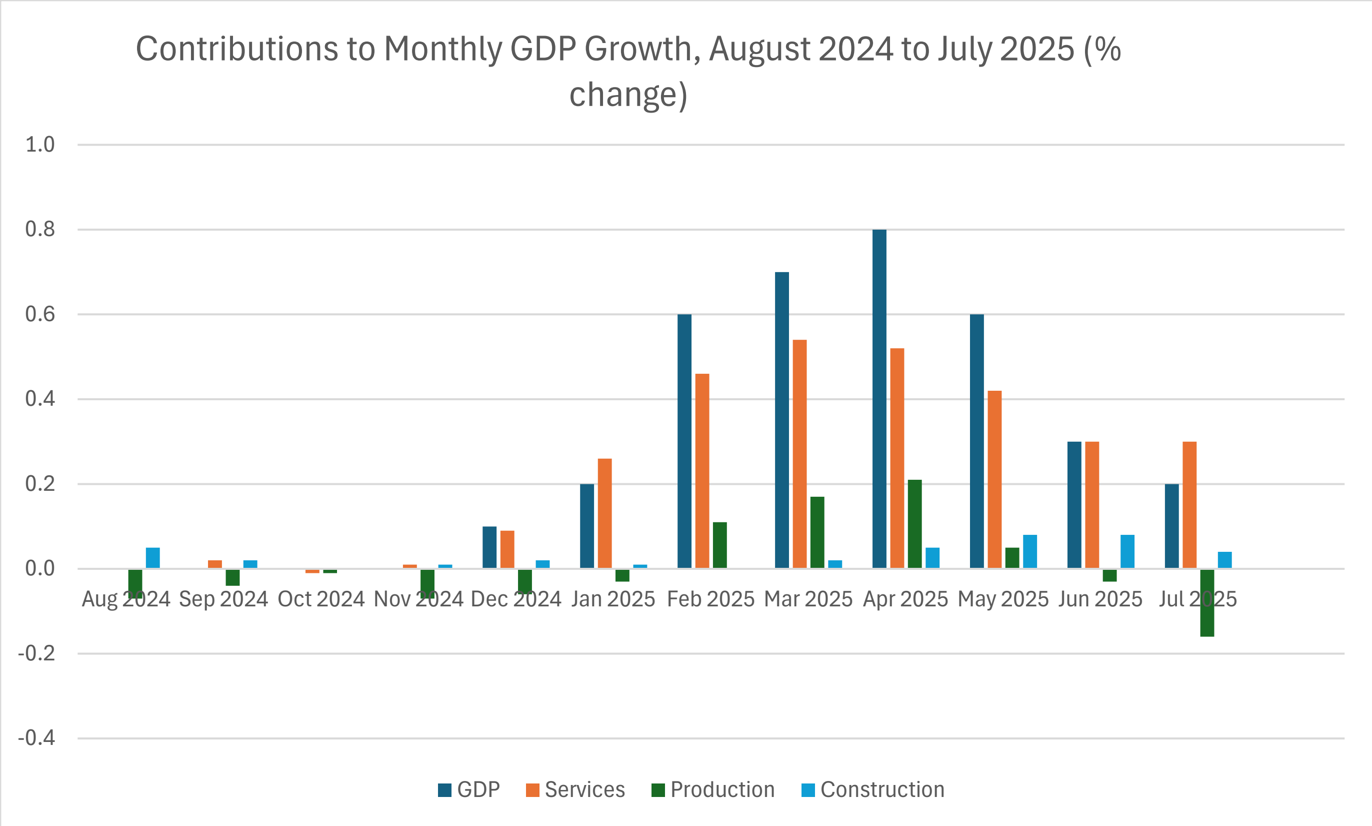
3.2 Based upon the scope of this Study, two areas should be examined: (a) national economic issues and trends; and (b) local issues in and around the SLP area. Within these topic areas, it is important to consider events which have occurred since the preparation of the previous evidence base study on retail and town centre issues in 2021 and also the adoption of the JCS, including how actual events may have matched or diverged from previous forecasts and assessments. For the avoidance of doubt, this section of the Study provides 'a point in time' assessment of the UK economy and retail, leisure and town centre sectors. Therefore, its contents should be read and understood with this in mind.

National Trends

GDP

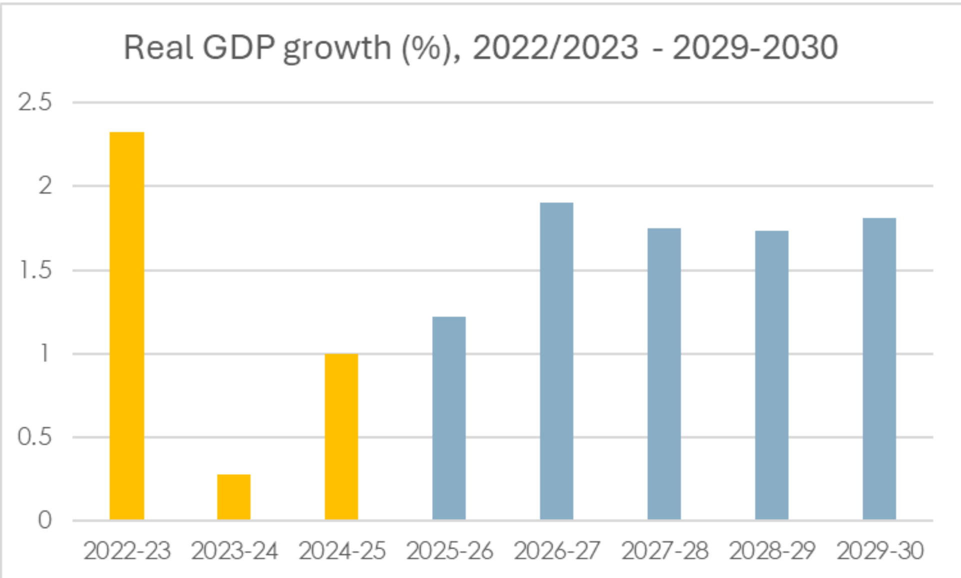
3.3 Monthly real gross domestic product ('GDP') is estimated to have grown by 0.2% in the three months to July 2025, compared with the three months to April 2025, largely driven by growth in the services sector in this period. Within the data published in September 2025, it is to be noted that there was growth in two of the three main sectors in the three months to July 2025: services and construction. The rise of 0.4% in the services sector had the largest contribution to the increase in GDP during this period, whilst construction output also grew by 0.6%. In contrast, production output fell by 1.3% over this three-month period to July.

Figure 3.1: UK GDP Change, 2024-2025 – Components of Change (Source: ONS)



3.4 Looking to the future, the Office of Budget Responsibility ('OBR') are predicting the economy to grow by around 1.2% during the 2025-2026 financial year, following a poorly performing 2023-2024 (0.27%) and 1% growth in 2024-2025. The OBR expects higher levels of growth in 2026-2027 (1.9%) and 1.8% in 2029-2030.

Figure 3.2: Real GDP Growth (Source: OBR)



Consumer Spending

3.5 As consumer spending accounts for around 60% of GDP, the financial health of households and their ability to spend are crucial factors in determining an economy's performance. Traditionally, consumer spending is the driving force behind GDP growth in the UK. In recent years, however, this has not been the case. First, the Covid-19 pandemic and associated lookdowns resulted in temporary large drops in spending and big changes to spending patterns (such as a greater share of spending on goods and less on services). Then, just as spending had recovered to its pre-pandemic level, the period of high inflation in 2022 and 2023 squeezed household budgets, resulting in stagnant spending in real (inflation-adjusted) terms.

3.6 Average household incomes across the country have increased since 2023 mostly because wage growth has been higher than inflation. Retail sales grew by 0.6% in July 2025, following 0.3% growth in June and a 1% contraction in May 2025. During Summer 2025, ONS has revised its retail sales data for 2024-2025 in order to correct some problems in allowing for seasonable adjustments. The revised data shows that retail sales grew by 1.1% over the first half of 2025, compared with an initial estimate of 1.7%. Many commentators have cited rising prices for essentials such as food and fuel as a key reason for sluggish retail sales.

Business Investment

3.7 Companies in recent years have faced rising costs (including for staff), weak demand, a high level of uncertainty, and higher borrowing costs as interest rates rose. One consequence has been that business investment has struggled to expand. In the first quarter of 2025 business investment increased by 5.9% and is 8.1% above the level in the same quarter of 2024. Forecasts by the National Institute of Economic and Social Research Think Tank similarly expect annual growth of between 2% and 3% in business investment during 2025 and 2026.

3.8 However, policy measures announced at the Autumn 2024 Budget (see later in this section) are now starting to affect businesses and their investment plans. This includes increases in National Insurance Contributions (NICs), alongside continued pressure on other costs including raw material and energy costs.

Unemployment

3.9 The UK unemployment rate stood at around 4.7% in June 2025 (based upon the official measure produced by the Office for National Statistics ('ONS')). Whilst the unemployment rate has been holding steady in recent months, other figures from the jobs market have been showing signs for concern. These include a noticeable fall in the number of job vacancies in the three months leading up to June 2025, from 762,000 to 718,000, alongside a drop of 26,000 payrolled staff during June. Many commentators see these changes as a direct consequence of the April 2025 increase in payroll taxes and the minimum wage.

3.10 Annual growth in average weekly wages, excluding bonuses, slowed to 5.2% in the first quarter of 2025. This was caused by weak private sector pay growth (with the overall figure buoyed by recent public sector pay deals).

Inflation

3.11 The annual rate at which prices of goods and services in the UK are rising. The consumer prices index ('CPI') inflation rate has slowed considerably since reaching 11.1% in October 2022, a 41-year high. UK inflation held steady at 3.8% in August 2025 on the back of higher food, restaurant and hotel prices. The UK has a target rate for inflation of 2%.

3.12 In September 2025, the OECD[11] predicted that consumer prices in the UK will rise by 3.5% in 2025, up from 2.5% in 2024. The UK's forecast inflation is the highest of the G7 group of advanced countries, above 2.2% in Germany, 1.9% in Italy and 1.1% in France. In recent months, the Bank of England has appeared to blame the government for contributing to recent rises in inflation, including the impact of NICs and the jump in the minimum wage.

Interest Rates

3.13 In August 2024, the Bank of England's Monetary Policy Committee (MPC) cut interest rates for the first time since the pandemic. The benchmark 'bank rate' was lowered from 5.25% to 5.0% and has continued to fall to 4%. Rates were held at 4% in September 2025, with the Bank of England indicating that it would not hurry to cut rates again (due to an on-going concern regarding the need to control inflationary pressures).

A Closer Look at the Retail Sector

3.14 Taking the above factors into account, Table 3.1 below provides a summary of Experian's 'central case' forecast for retail sales growth and associated floorspace requirements at the UK level over the short to medium term 2023-2032 and the longer term (2023-2040). The figures also take into account the impact of special forms of trading ('SFT') (i.e. internet shopping) and floorspace efficiency gains.

3.15 The table shows that efficiency gains in floorspace are likely to match retail sales growth minus SFT up to 2032, thus leading to a situation where there is negligible growth in retail floorspace. Over the longer term to 2040, the outlook is expected to improve slightly, although the potential for net gains in floorspace remains very low, at 0.2% per annum and 3.3% overall from 2023 until 2040.

Table 3.1: retail sales growth, efficiency gains and floorspace requirements

	% p.a. 2023 - 2032	Cumulative Growth, 2023-2032	% p.a. 2023-2040	Cumulative Growth, 2023-2040
Retail sales growth	1.6	14.8	1.8	35.6
Retail sales growth, less SFT adjusted for sales from stores	1.1	10.0	1.3	24.7
Efficiency gains	0.9	8.7	1.2	21.5
% increase in floorspace required after efficiency gains (sales growth less efficiency gains)	0.1	1.3	0.2	3.3

Source: Experian, 2025

3.16 In order to get a broader picture of floorspace requirements, the above figures should also be read alongside vacancy levels across the country. At the present time, the national average rate for vacant retail and service property in town centres in the UK is 14.1%. This rate of vacancy has remained virtually unchanged since the Covid-19 pandemic when national average vacancies stood at 13.8% in 2021-2022. However, these levels are noticeably higher than pre-pandemic levels of 11.3% in 2018 and 12.0% in 2019. This overall picture, where almost one in six units within the UK's retail centres is empty, is a clear cause for concern and is a key indicator of potentially too much retail floorspace within town centres. However, it is also important that this wider UK situation should, however, be compared with local circumstances in the SLP, which is covered in the next section of this Part 1 report.

[11] Organisation for Economic Co-operation and Development

3.17 Alongside sales growth, it is also important to examine retail spending volumes, as this type of forecast is a key input into local authority retail floorspace capacity assessments, such as those contained in the 2021 Retail Study. In particular, the scale of change in retail spending will have an influence on the turnover of existing retail stores and also help to establish whether there is a case for net additional floorspace to be provided over the course of the development plan period.

3.18 Table 3.2 below compares the forecast annual changes in retail expenditure per head on all comparison goods from the time of the 2021 Retail Study and the latest available forecasts from Experian. The table also contains the forecasts used in the 'Gloucester, Cheltenham and Tewkesbury JCS Retail Study 2011-2031, 2015 Update'[12] ('the 2015 Study'). The 2015 Study is included within this analysis on the basis that it was the evidence base study which underpinned retail and town centre land use issues in the JCS.

3.19 The table shows the year-on-year change forecasts over the period 2020-2034. This period matches the assessment timeframe in the 2021 Study and allows for a comparison on a consistent basis with the forecasts used in the 2015 Study and also the latest forecasts from Experian. For completeness, the period 2015-2020 (from the 2015 Study) and the period 2035-2040 (from the 2021 Study and the latest (2025) forecasts) is also contained within Table 3.2.

3.20 Table 3.2 shows that, at the time of the 2015 Study, the total forecast growth up to 2034 was circa +48%. However, by the time of the 2021 Study, growth between 2020 and 2034 had dropped to circa +37%. This has now reduced further, based upon the latest future retail spending (per head) forecasts published earlier in 2025, to +23%. Therefore, the total level of forecast growth in total comparison goods spending per head has reduced by around one third between 2021 and 2025 and more than halved since 2015.

[12] Prepared by DPDS and published in February 2016

Table 3.2: forecast year-on-year change in per capita comparison goods spending from 2015 until 2040

	Retail Planner 13 (2013) % Growth p.a.	Retail Planner 18 (2020) % Growth p.a.	Retail Planner 22 (2025) % Growth p.a.
2015	5.3	-	-
2016	3.2	-	-
2017	2.9	-	-
2018	2.7	-	-
2019	2.8	-	-
2020	3.0	-8.5	-8.6
2021	3.2	6.5	6.7
2022	3.1	3.8	3.8
2023	3.3	3.6	-2.7
2024	3.3	2.9	-0.3
2025	3.1	2.8	0.7
2026	3.1	2.9	1.8
2027	3.2	2.9	2.2
2028	3.1	2.8	2.7
2029	3.2	2.9	2.8
2030	3.3	2.9	2.8
2031	3.2	2.9	2.8
2032	3.4	2.9	2.8
2033	3.4	2.9	2.8
2034	3.3	2.9	2.7
Total Change, %, 2020-2034	***+48.2***	***+37.1***	***+23.0***
2035	-	2.9	2.7
2036	-	2.9	2.7
2037	-	2.9	2.7
2038	-	2.9	2.6
2039	-	2.9	2.6
2040	-	2.9	2.6

Source: Experian

3.21 The same exercise as contained in Table 3.2 is replicated for convenience goods expenditure per head in Table 3.3 below. This also shows a material difference between the forecasts available at the time of the 2015 and 2021 studies alongside the latest comparable forecasts in 2025. Once again, the focus is on the core period of 2020 to 2034.

3.22 Table 3.3 shows that in contrast to the +2.6% growth anticipated at the time of the 2021 Study (for the period 2020-2034), the latest forecasts for convenience goods spending per head show a -4.7% fall in the level of spending per head over the same period. Looking beyond 2034, both the 2021 Study and the latest forecasts from Experian are showing minimum change, with the 2025 forecast indicating nil change.

Table 3.3: forecast year-on-year change in per capita convenience goods spending between 2015 and 2040

	Retail Planner 13 (2013) % Growth p.a.	**Retail Planner 18 (2020) % Growth p.a.**	**Retail Planner 22 (2025) % Growth p.a.**
2015	-0.2	-	-
2016	0.1	-	-
2017	0.3	-	-
2018	0.2	-	-
2019	0.2	-	-
2020	0.1	8.4	6.4
2021	0.1	-6.2	-1.4
2022	-0.1	0.2	-4.6
2023	0.1	0.0	-2.9
2024	0.2	0.1	-1.1
2025	0.1	0.1	-0.2
2026	0.1	0.0	-0.2
2027	0.1	-0.1	-0.1
2028	0.1	0.0	-0.1
2029	0.1	0.0	-0.1
2030	0.1	-0.1	-0.1
2031	0.1	0.0	-0.1
2032	0.1	0.0	-0.1
2033	0.2	0.1	-0.1
2034	0.1	0.1	0.0
Total Change, %, 2020-2034	***+1.5***	***+2.6***	***-4.7***
2035	-	0.1	0.0
2036	-	0.1	0.0
2037	-	0.1	0.0
2038	-	0.1	0.0
2039	-	0.1	0.0
2040	-	0.1	0.0

Source: Experian

3.23 It should be noted that the expenditure per head figures in Tables 3.2 and 3.3 above are total spending levels, inclusive of spending via special forms of trading (i.e. internet shopping). Therefore, Table 3.4 below compares the total annual change in spending per head for comparison goods against adjusted spending figures which strip out purely internet spend[13]. This comparison includes forecasts which were available at the time of the 2021 Study and the latest forecasts from Experian (2025).

Table 3.4: forecast year-on-year change in per capita comparison goods spending between 2015 and 2040

	2021 Study (2020 forecasts) Comparison Goods % Growth p.a. (including online spend)	**2021 Study (2020 forecasts) Comparison Goods % Growth p.a. (excluding purely online spend)**	**2025 Study (2025 forecasts) Comparison Goods % Growth p.a. (including online spend)**	**2025 Study (2025 forecasts) Comparison Goods % Growth p.a. (excluding purely online spend)**
2020	-8.5	-14.5	-8.6	-24.3
2021	6.5	8.1	6.7	8.2
2022	3.8	2.9	3.8	8.0
2023	3.6	2.7	-2.7	-1.7
2024	2.9	2.0	-0.3	-2.0
2025	2.8	1.9	0.7	-0.7
2026	2.9	2.0	1.8	0.7
2027	2.9	2.1	2.2	1.0
2028	2.8	2.3	2.7	1.8
2029	2.9	2.4	2.8	2.0
2030	2.9	2.5	2.8	2.0
2031	2.9	2.5	2.8	1.9
2032	2.9	2.5	2.8	1.9
2033	2.9	2.6	2.8	1.9
2034	2.9	2.6	2.7	1.9
Total Change, %, 2020-2034	**37.1**	**24.6**	**23.0**	**2.6**

Source: Experian

3.24 Table 3.4 shows that, at the time of the 2021 Study, growth between 2020 and 2034 for comparison goods spending per head was circa +25% when purely online sales were removed from the forecasts. A similar level of growth between 2020 and 2034 is recorded / forecast within the latest (2025) Experian data, although this latest data is for all comparison spending per head. When purely online sales are removed then growth up to 2034 drops dramatically to +2.6%.

3.25 It should be noted that the comparison between the 2021 and 2025 data is heavily influenced by the events of 2020 when comparison goods spending per head fell by 24%. Therefore, if the period 2020-2023 is removed from the comparison between the 2021 and 2025 data, then the (adjusted) growth for 2025-2034 used within the 2021 Study was +25%, whilst the latest forecasts suggest a +12% growth over the same period.

[13] i.e. removing any spending which is not associated with physical stores, in order to distinguish between those sales which are fulfilled by stock held in Class E(a) stores.

3.26 Table 3.5 below shows the market share of pure online sales for both convenience and comparison goods. Again, a comparison is made between the forecasts used in the 2021 Study and the data which is available at the present time. The contents of the table show that although there are some differences, these are minor.

Table 3.5: special forms of trading allowances for convenience and comparison goods expenditure, 2020-2034

	2021 Retail Study – Convenience SFT	2021 Retail Study – Comparison	2025 Experian Forecast – Convenience SFT (adjusted)	2025 Experian Forecast – Comparison SFT (adjusted)
2020	6.3	22.9	4.6	26.7
2025	6.2	24.6	5.2	24.1
2030	6.8	26.9	6.0	25.9
2034	7.1	27.9	6.5	27.3

Notes: 2021 Study data taken from forecasts published by Experian in October 2020. 2025 data based on forecasts published by Experian in March 2025. In both instances, Experian SFT data has been adjusted for sales associated with physical stores

The Retail & Leisure Sectors

3.27 Alongside data on retail and leisure expenditure, it is also important to examine trends in retail sector in terms of the presence of retailers and leisure uses in high streets and out of centre locations as this can also help to understand the wider aspects of 'need' from a commercial viewpoint.

The retail sector

3.28 It is a well-established fact that the retail and leisure sectors, which have been a mainstay in all UK high streets and, more latterly, out of centre retail/leisure parks, have fast-moving trends. Over the latter half of the 2010s and the early 2020s there were a number of high-profile business casualties. Within the non-food sector, businesses such as Paperchase, Debenhams, Topshop (and other parts of the Arcadia Group), Carpetright, Ted Baker and Poundworld have all failed. In addition, there have been a significant number of store closures by other high profile national multiple retailers such as House of Fraser (now trading as Frasers) and Argos (with the brand moving into Sainsburys stores).

3.29 For many years, the DIY and homewares retailer Homebase has faced a number of difficulties and has changed ownership on a number of occasions. In November 2024, Homebase entered into administration, with CDS (owner of The Range) buying a number of existing stores, although uncertainty currently surrounds the future of around 50 other Homebase units. Sainsburys are also planning to open new supermarkets in a small number of former Homebase stores, whilst Marks & Spencer has recently announced that it will open 13 Foodhall format stores in former Homebase premises.

3.30 In Spring 2025, a number of other national multiple retailers announced restructuring plans. These include:

a. Poundland: following the takeover by Gordon Brothers, it was announced in June 2025 that around 150 Poundland stores across the UK would be closing, whilst the product range in the remaining stores would be restructured to remove the sale of frozen food goods. Details of which stores are likely to close have not yet been announced, although it is to be noted that Poundland occupy both high street and retail park locations.

b. River Island: in June 2025 it was announced that 33 River Island stores would be closing by January 2026. One of the stores to be closing is the Gloucester city centre branch.

c. WH Smith: the change in ownership of the 233-year old iconic high street chain was also concluded in June 2025. The name of the business has now changed to TG Jones and it remains, at the present time, unclear what the future holds for all the existing WH Smith high street stores. The new owners, Modella, also own Hobbycraft and The Original Factory Shop, both of which have announced store closures[14].

3.31 The closure of these stores has and will create significant vacancies and available retail floorspace in many town and city centres. In the recent past, some stores, such as those in high-profile locations and/or in modern format premises, have been re-occupied by other comparison goods retailers, although this has not been universal. For example, former department store units occupy large multi-level premises, many of which were built in the post-war period specifically for that particular purpose. As a result, their attractiveness to alternative uses, even other comparison goods uses, is limited, which has resulted in many long-term vacancies. In some cases, alternative non-retail uses are being promoted as landlords and local authorities have reached the realisation that continued retail use is simply not an option.

3.32 It should also be noted that the failure and restructuring of national retail businesses has the potential to affect town centres in a number of different ways. The direct impacts – i.e. high street store closures – have been outlined above, although closures and reorganisation at out of centre retail parks / retail warehouses could also have indirect impacts. For example, the closure of stores such as Homebase allows for out of centre space to become available which could, in turn, lead to either/both: (a) retail relocations from town centres; (b) additional trade diversion from defined 'town centres'. The effects of this phenomenon are currently being worked through in relation to the Homebase store closures.

3.33 One interesting counterpoint to the competition posed by large out of centre retail warehouse stores is the change in the format of a well-known national comparison goods retailer: Ikea. Known for its large format out-of-centre stores, Ikea has in recent years decided to branch out into smaller city centre stores which display a smaller range of goods. The first stores for this format include Hammersmith (which will soon also be accompanied by its first stand-alone restaurant), the forthcoming Oxford Street store[15] and Brighton[16]. In addition, it is also to be noted that another well-known retail business, Topshop, which closed its stores in 2020, is now returning to the high street, with the sale of its products in John Lewis stores due to start early next year[17].

3.34 Table 3.6 below provides data, published by Green Street and PwC, on store openings and closures across the UK. It shows that there has been a consistent net loss in store numbers, with circa 5,000 premises lost in 2023 and 3,800 in 2024. The number of store openings has been consistency lower in recent years (2023-2024) than the period 2015-2019, following the Covid pandemic. It is also notable that, since 2018, the net reduction in store numbers has been larger than the pre-2018 period.

[14] 9 store closures for Hobbycraft, including Bristol (Imperial Park), Cirencester and Lakeside. The Original Factory Shop stores to close including Pershore, Milford Haven, Shaftesbury and Kidwelly
[15] Due to open in Spring 2025 in the former TopShop flagship store
[16] Due to open in Spring 2025
[17] This is in addition to the sale of Topshop products in Liberty

Table 3.6: retail store openings and closures, 2015-2024

	Store Closures	Store Openings	Net Change
2015	13,268	12,121	-1,147
2016	14,439	11,806	-2,633
2017	16,274	12,264	-4,010
2018	15,304	8,767	-6,537
2019	17,338	9,690	-7,648
2020	17,532	7,655	-9,877
2021	17.219	7,160	-10,059
2022	11,530	7,903	-3,627
2023	14,081	9,138	-4,943
2024	12,804	9,002	-3,802

Source: Green Street and PwC

3.35 Table 3.7 concentrates upon net closures over the period 2014-2024 and breaks down the available data into separate locations. It shows the rate of change over the past decade and is based upon an indexation of 100 at 2014.

Table 3.7: outlet net closures by location, 2014-2024 (2014 = 100)

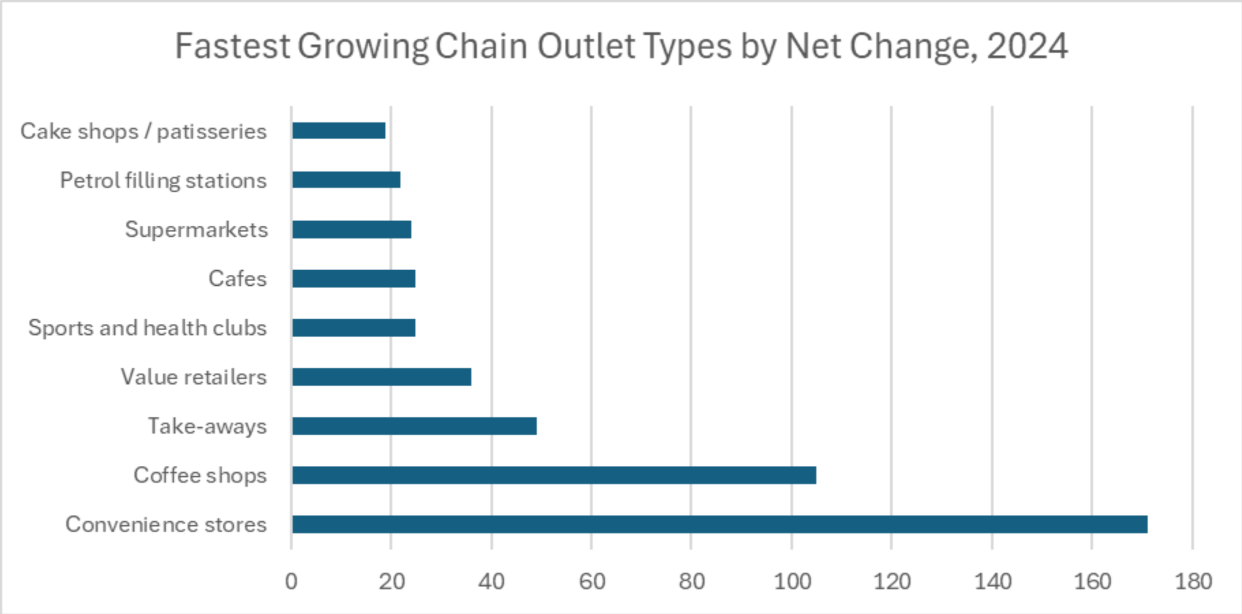
	UK Average	Retail Park	Stand Alone Stores	Shopping Centre	High Street
2014	100	100	100	100	100
2015	99	105	99	101	99
2016	99	103	98	100	98
2017	97	103	97	98	96
2018	94	102	95	95	92
2019	91	100	91	91	88
2020	86	97	88	85	83
2021	82	92	85	79	79
2022	81	92	84	78	77
2023	79	93	82	76	74
2024	78	93	81	75	73

Source: Green Street and PwC

3.36 Against a backdrop of a net loss of stores between 2014 and 2024 across all locations, it is noticeable that a net loss in stores in retail park locations has only occurred since 2019. This is not matched by the other locations, with high street and shopping centre locations losing around one quarter of stores. Given the location of individual stores in shopping centre and high street locations, this has significantly affected the UK average, which has been a 22 point net loss up to 2024.

3.37 Figures 3.3 and 3.4 show the net change in different types of shops and service uses across the UK in 2024. Figure 3.3 shows the fastest growing chain outlets, by use type, in 2024 and indicates that the only two types of outlets which were able to add, on average, a net additional store per week (i.e. net change higher than 52) were convenience stores and coffee shops. However, despite lower levels of growth, the other types of businesses shown below are those which have also been able to make a positive contribution. Unsurprisingly, these include: cafes, sports and health club uses, supermarkets[18], value retailers and take-aways.

Figure 3.3: fastest growing chain outlet types by net change, UK, 2024



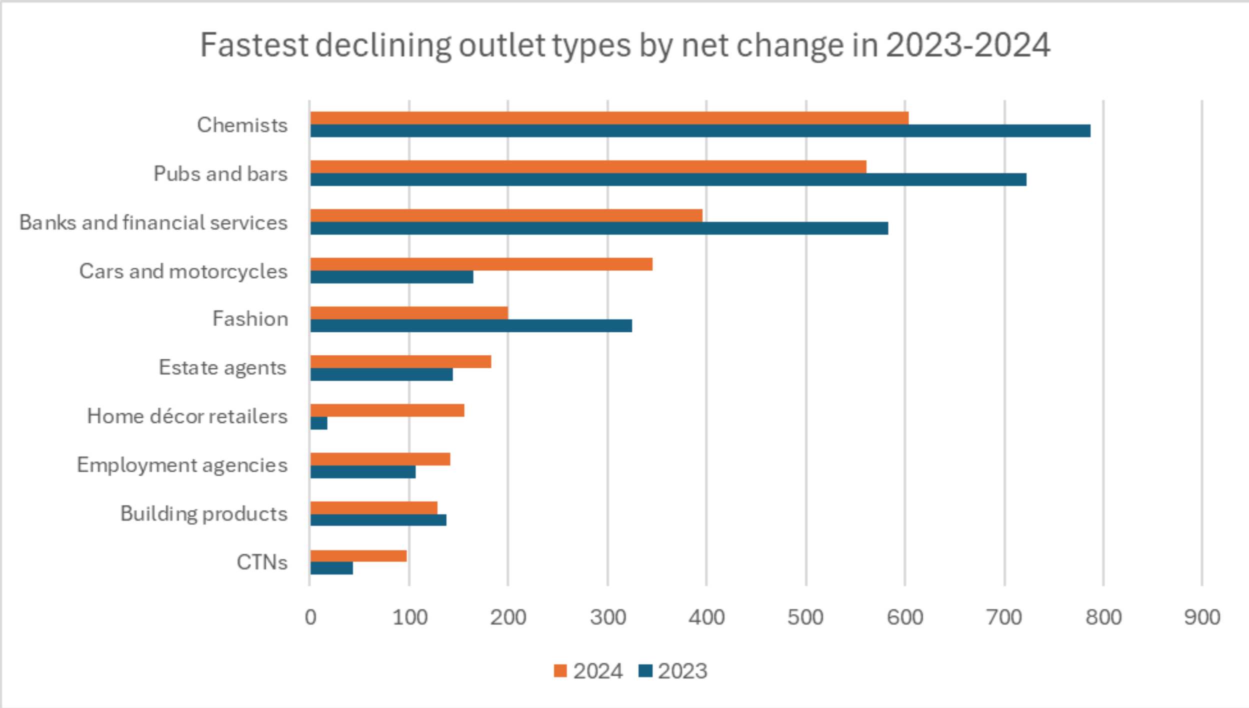
Source: Green Street

3.38 In contrast, the types of businesses shown in Figure 3.4 below are the ones showing the largest levels of decline from 2023-2024. The most notable, but probably not unsurprising ones, are chemists, pubs and bars and banks/financial services. There was a loss of around 600 chemists in 2024, following a larger loss of just under 800 chemists in 2023. In 2024, around 550 pubs/bars closed, which was less than the circa 700 units closing in 2023.

3.39 It is also notable that there has been a large number of closures in the clothing/fashion sector, with just over 300 stores closing in 2023 and 200 stores closing in 2024.

[18] Driven by the expansion programmes of ALDI and Lidl

Figure 3.4: fastest declining outlet types by net change, UK, 2023-2024



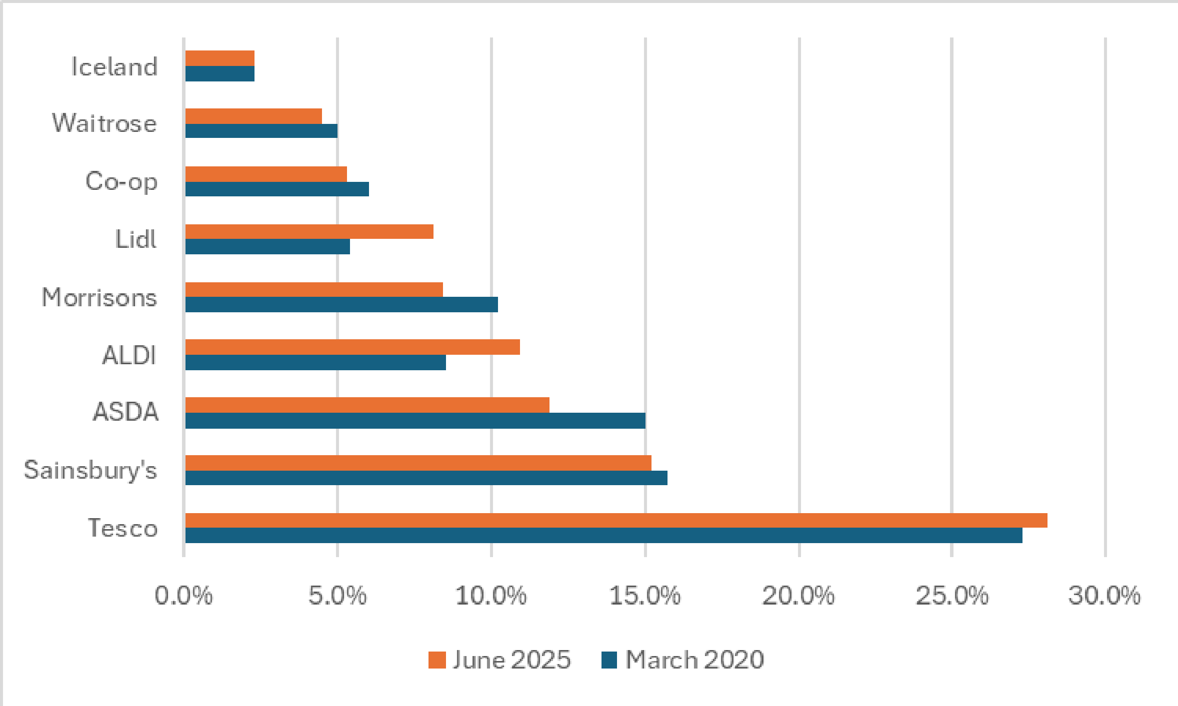
Source: Green Street

The grocery sector

3.40 Within the grocery retail sector, the headline trend over the past five years has been the continued rise of discount stores such as ALDI and Lidl. These operators are now a well-established part of the UK grocery sector and, in combination now (in 2025) control around 19% of the UK grocery market. Indeed, ALDI overtook Morrisons in 2022 to become the UK's fourth-largest grocer by market share.

3.41 Figure 3.5 below outlines the market share of the main grocery retailers in the UK in 2020 and 2025. The growth in market share for Lidl and ALDI is clear, which has largely been at the expense of ASDA and Morrisons. Tesco remains, by far, the largest grocer by market share, with 28.1% of spending in June 2025.

Figure 3.5: individual retailer market shares, 2020 & 2025



Source: Kantar

3.42 Looking forward, both ALDI and Lidl have significant continuing expansion plans. ALDI have a longer-term goal of 1,500 store openings in the UK (following the opening of its 1,000th store in the UK earlier in 2024). Lidl have previously stated that they have a target of opening 1,100 stores by the end of 2025 (Lidl currently has around 960 stores in the UK).

The leisure sector

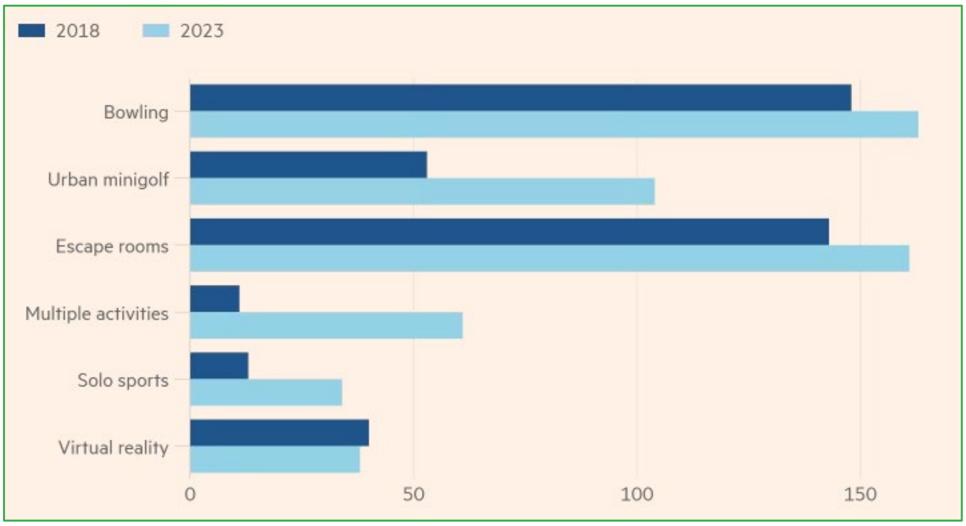
3.43 Turning to the leisure sector, the available market data shows a complex picture. The COVID-19 pandemic had a huge effect on the performance of this sector, which led to significant business closures and loss of employment opportunities. The sector has bounced back and, according to research published by Deloitte, confidence reached a two year high in the first quarter of 2024. Since that time, however, recent research published by Deloitte has found that sentiment in 'eating out' and 'drinking in pubs and bars' has declined by about 6 percentage points over the remainder of 2024. This has been driven by the cost of living and increasing prices in the leisure sector particularly in the food and beverage sector. In recent years, costs for leisure and hospitality businesses have increased significantly, driven by higher energy and food costs, along with rising wages.

3.44 Data shown earlier in this section[19] indicates the impact of cafes and coffee shops on the occupation of premises on the high street, which is part of a longer-term trend in most city, town and district centres towards more of a service-based offer. Cafes have also been a big part of the evolution of out-of-town retail and leisure parks, which have traditionally focused upon comparison goods retailing and 'big box' leisure facilities (such as multi-screen cinemas and ten-pin bowling premises). With car parking areas under-utilised, and landlords looking for additional sources of income, proposals for stand-alone cafes (sometimes with drive-through elements) are now a common feature at out-of-town facilities; a trend which is also occurring as part of the expansion of discount foodstore operator sites.

[19] See Figure 3.3

3.45 Within the leisure sector, the post-pandemic period has seen some changes within key categories and their demand for space in town centres and out of town locations. In particular, there has been a shift in the types of venue being visited. In October 2024, Hollywood Bowl, the UK's largest ten-pin bowling operator indicated that like-for-like sales were a product of intensifying competition from new emerging leisure sectors, from axe-throwing to mini golf. Whilst 'active family' venues, such as ten-pin bowling, remain popular, there has been a growth in other activity-focused venues such as darts, cricket, escape rooms, axe-throwing and shuffleboard. According to the real estate adviser Savills the number of UK activity-focused venues has increased by around 40% since 2018 to 600 in 2024. Savills expect that the number of sites will increase further to 800 by 2029. The increase in the types of venue, by activity between 2018 and 2023, is shown in Figure 3.6 below.

Figure 3.6: UK socialising venues, number by segment, between 2018 and 2023 (Source: Savills)



4. The Main 'Town Centres' & Wider Retail and Leisure Land Use Provision

Introduction

4.1 A key foundation for the retail and 'town centre' land use strategy within the SLP is a robust set of evidence in relation to retail land use provision and the wider characteristics of the main 'town centres' in the Gloucester, Cheltenham and Tewkesbury area. Therefore, this section of Part 1 of the Study provides:

a. A review of land use trends within the five main 'town centres' in the SLP area: Gloucester, Cheltenham, Tewkesbury, Winchcombe and Bishops Cleeve.

b. A review of the main changes in retail land use provision in each local authority area since the adoption of the JCS and the completion of the 2021 Retail Study, including key proposals and commitments for changes in retail land use provision.

c. An assessment of current spending patterns and associated market share levels for retail and food/beverage uses across the different parts of the SLP area, including an analysis of the catchment areas of the main settlements and defined 'town centres'.

4.2 This study provides a detailed analysis of these three topics for each of the five main centres/settlements, and the scope of evidence gathering for this stage of the Study is outlined below.

Evidence Gathering

'Town Centre' Land Use Data

4.3 An analysis of data on retail, leisure and financial/business services land uses provides a key contribution to the Study in a number of different ways. First, it provides a key indicator of the current performance, role and function of each defined centre. Second, it enables an analysis of the land use characteristics of each centre over time, including the period since the completion of the 2021 Retail Study. Third, the land use assessment provides an important contribution to the assessments of retail and food/beverage floorspace need which will be undertaken in Part 2 of the Study.

4.4 As noted in Section 1 of this document, the scope for this Study focuses upon the five main 'town centres' in the defined hierarchy in Policy SD2 of the JCS. The 2021 Retail Study undertook a detailed review of the other district, local and neighbourhood centres across the Gloucester, Cheltenham and Tewkesbury administrative areas. Assessments of these centres are not repeated in this Study, with the results of the 2021 study intended to be used for recommendations regarding the overall 'town centre' hierarchy across the SLP area. However, shopping patterns associated with the larger of these centres, such as the district centres in Cheltenham, will be picked up via the assessment of retail spending referred to later in this section.

4.5 In order to analyse the retail and service land use profile of each of the five main 'town centres', the following actions have been undertaken for Part 1 of this Study:

a. For Gloucester city centre, plus the 'town centres' of Cheltenham, Tewkesbury and Winchcombe, land use data has been obtained from Experian GOAD. The latest available data gathered by Experian for each of these centres is dated 2024 and, in addition, historic data for 2018/2019 has also been obtained in order to show the land use profile of each of these centres since the preparation of the 2021 Retail Study. In order to bring the latest (2024) Experian data up to date, Nexus has undertaken land use surveys during Spring and Summer of 2025.

b. Experian GOAD does not undertake regular surveys of the village centre in Bishops Cleeve. Therefore, in line with the 2021 Retail Study, a land use survey was undertaken by Nexus in Spring 2025 which follows the same format at the survey conducted for the 2021 study.

4.6 A summary of the land use data for each of the five main 'town centres' can be found in Appendix A to this document. For Cheltenham, Tewkesbury, Gloucester and Winchcombe the basis for the retail and service land use data between 2018/2019 and 2025 is Experian's 'Category Report' classification, which presents land use information across convenience and comparison goods retail categories, alongside service land uses split into retail service, leisure survey and financial/business services. Data on vacancy levels is also provided for the period 2018/2019 to 2025.

4.7 For each of these four centres the land use data for each year is provided in terms of both: (a) the number of units occupied in each category; and (b) the amount of ground floor floorspace occupied in each category. This data is presented in absolute terms and also as a proportion of overall surveyed units/floorspace. In order to provide consistency with the 2021 Retail Study, the land use data for Bishops Cleeve concentrates upon the number of units occupied in the village centre boundary using Experian's 'Centre Report' classification.

4.8 In addition to the land use data for each of the five 'town centres', Appendix A also contains information on the current national average levels for units and floorspace occupation for the Category Report and Centre Report land use classifications. This enables the analysis to provide an assessment of how each centre compares against national average levels.

Spending Patterns Data for Retail & Food/Beverage Uses

4.9 A further key aspect of our evidence base analysis is a review of current shopping and retail spending patterns across the SLP area, including market share data for the main centres and grocery stores. In order to inform this assessment, this Study has obtained spending data from Experian's Spend Insight ('ESI') database. This is a database of around 4 million debit and credit cards from across the UK and provides data on spending levels at specific shopping destinations and the source of this spending[20].

4.10 The data which has been obtained from Experian is based upon the following parameters:

a. Spending data has been obtained for the key locations across the SLP area. This includes each of the five main 'town centres', along with specific foodstores/supermarkets and key retail park/warehouse facilities.

b. Spending data has been obtained for grocery stores, comparison goods shops and food/beverage facilities (such as cafes, restaurants, pubs/bars, and take-aways).

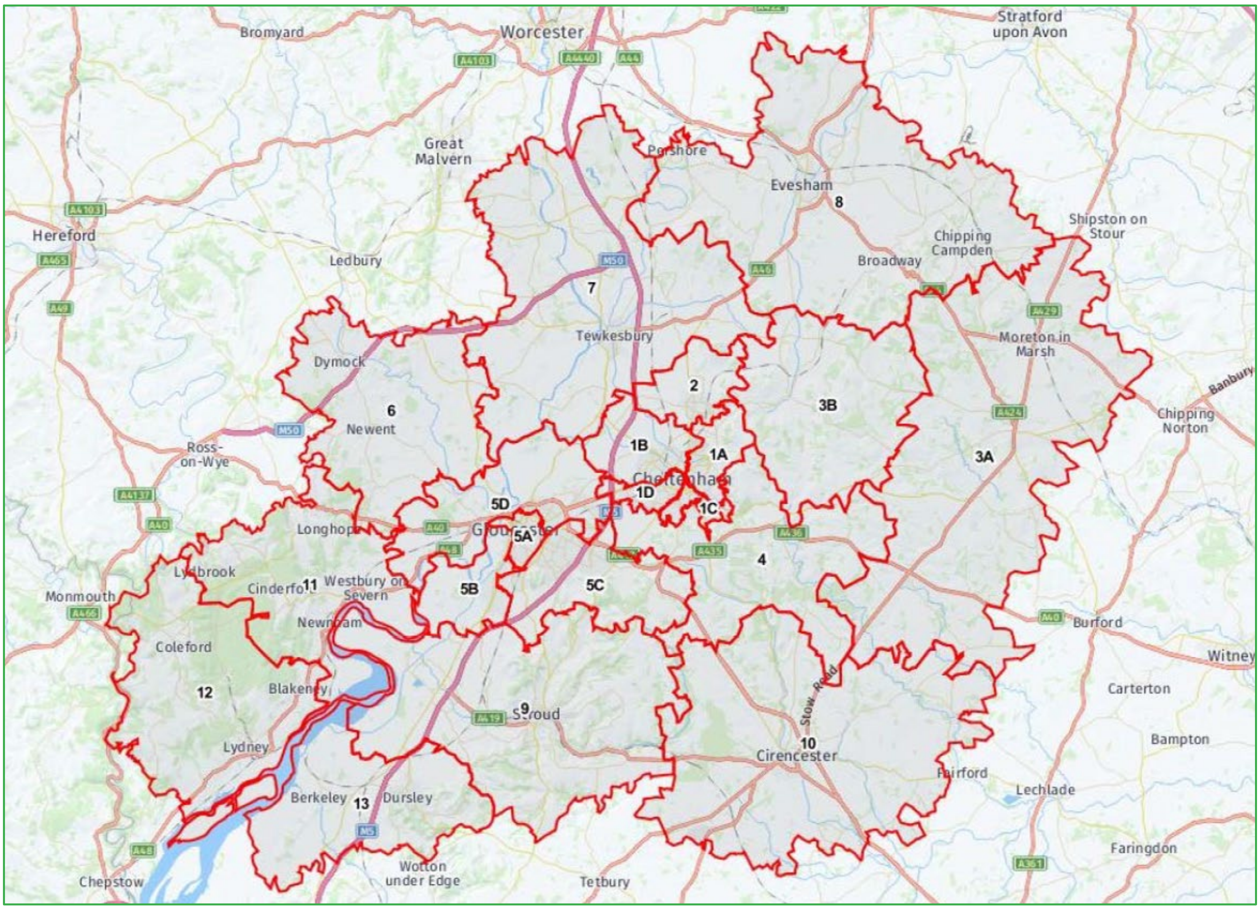
c. In order to build up a picture of the shopping catchment area of the main locations, the ESI spending data has been obtained on a zone-by-zone basis. This enables our analysis to show the scale of spending (and associated market share) from defined individual parts of the SLP area. Figure 4.1 below provides a plan of the zones which have been used to organise the ESI data. These zones are based upon postcode sector areas and are consistent with the zones used in the 2021 Retail Study. Table 4.1 below provides a list of those postcode sectors that comprise each zone. A plan of the study area is also contained at Appendix B to this report.

[20] For the avoidance of doubt, the ESI data does not record cash sales and, therefore, for the purposes of this assessment, patterns of cash sales are assumed to follow the same distribution as credit/debit card sales.

d. In addition to the expenditure which is flowing to specific destinations in the SLP area from each of the 20 study area zones, the ESI data also provides an estimate of spending attracted by SLP retail and food/beverage facilities from outside of the study area[21].

e. The spending data provided by ESI is based upon the calendar year 2024.

Figure 4.1: plan showing study area used for the collection of Experian Spend Insight data



[21] Non-study area UK spending only.

Table 4.1: study area zones and their constituent postcode sectors

Zone	Postcode Sectors
1a	GL52 2/3/5/6
1b	GL50 4, GL51 0/7/8/9
1c	GL53 0/7/8
1d	GL50 1/2/3, GL51 3/6
2	GL52 7/8/9
3a	GL54 1/2/3, GL56 0/9
3b	GL54 5
4	GL51 4, GL53 9, GL54 4
5a	GL1 1/2/3/4/5
5b	GL2 2/3/4/5
5c	GL3 3/4, GL4 0/3/4/5/6
5d	GL2 0/8/9, GL3 ½
6	GL18 1/2, GL19 3
7	WR8 0/9, GL20 5/6/7/8, GL19 4
8	GL55 6, WR10 1/3, WR11 1/2/3/4/7/8, WR12 7
9	GL10 2/3, GL2 7, GL5 1/2/3/4, GL6 8/9
10	GL7 1/2/5/6/7
11	GL14 1/2/3, GL17 0/9
12	GL15 4/5/6, GL16 7/8
13	GL11 4/5/6, GL13 9

4.11 In order to turn the raw ESI spending data sample into market share levels for the various retail destinations in the SLP area, the level of spending at each specific destination/area is expressed as a proportion of the overall spending (at all destinations) within each zone. The result of this process is shown in the market share data contained within Tables 4, 6, 8 and 10 at Appendix C. These tables have been structured to provide the following information:

a. Across all of the tables, the market share of the main centres and other key destinations is shown on a zone-by-zone basis. For convenience goods retail provision (Table 4), data for all the main grocery stores in each settlement is provided, along with the main 'town centre' areas and an 'other' category for each main settlement.

b. A similar approach is taken for comparison goods shopping (Table 6), with the analysis showing the main town and district centres along with key out of centre destinations such as: (a) Gloucester Quays; (b) Eastern Avenue and St Oswalds Retail Park in Gloucester; and (c) Tewkesbury Road/Kingsditch in Cheltenham.

c. The market share assessment for both convenience and comparison goods spending also includes the following information:

1. The proportion of retail spending, within each category, which is flowing to destinations outside of the SLP area; and
2. The proportion of spending on convenience and comparison goods which is being directed via online shopping[22].

d. The structure of the food/beverage market share data in Tables 8 (Class E(b) food/beverage) and 10 (sui generis[23] food/beverage) follows the structure of the comparison goods retail data.

4.12 The market share data referred to for each of the main centres can be found in the following tables at Appendix C to this document:

a. Table 4 – convenience goods market share levels

b. Table 6 – comparison goods market share levels

c. Tables 8 and 10 – market share levels for Class E(b)[24] food/beverage (Table 8) and sui generis food/beverage uses[25] (Table 10)

4.13 Tables 5a, 7a, 9a and 11a translate the market share data for the various SLP retail and food/beverage destinations into annual turnover forecasts for 2025 by applying the corresponding market share data to total available expenditure within each of the study area zone. This analysis is the first step in the wider quantitative need assessment which will be contained in Part 2 of the Study, which will include: (a) an assessment of future turnover levels for stores and centres in the SLP area (using population forecasts which match the preferred spatial strategy option for the SLP); (b) an assessment of the quantitative need for retail and food/beverage floorspace[26].

4.14 These tables also provide an estimate of the amount of potential 'expenditure inflow' which is attracted by each of the main convenience, comparison and food/beverage destinations across the SLP area. 'Expenditure inflow' comprises the amount of spending that destinations in the SLP are estimated to attract from customers residing outside of the study area. It has been calculated on the basis of the proportion of spending that the ESI data shows is being spent by non-study area customers.

4.15 In order to calculate the current turnover levels for convenience and comparison goods floorspace, along with food/beverage destinations, the following step-by-step process is followed:

a. Calculation of the total resident population of each study area zone (Table 1).

b. Forecast per capita spending levels for convenience and comparison goods and food/beverage trips for residents of each zone (Tables 2a-2d).

c. Calculation of the total amount of available expenditure within each study area zone by multiplying (a) and (b) above (Tables 3a-3d).

[22] The market share data for online shopping shown in Tables 4 and 6 at Appendix C comprises all online purchases for convenience and comparison goods. When reading this market share for each study zone it should be appreciated that the goods purchased via some of these online sales will be sources from physical bricks and mortar Class E(a) stores in the local area. This will be particularly true for grocery shopping online orders, where a large proportion of the order is sourced from the closest large foodstore/supermarket (rather than being sent from a Class B8 warehouse from elsewhere in the UK)
[23] Uses which are 'of their own kind' or 'own kind of class', which cannot be classified with other land uses in the Use Classes Order
[24] Cafes and restaurant uses
[25] Drinking establishments and take-aways
[26] Including a comparison between the actual current turnover levels of the main grocery stores in the SLP area against benchmark turnover levels

4.16 The base population data for the analysis is contained in Table 1 at Appendix C. Population data for each of the study area zones has been obtained from Experian, with their 2025 forecasts used for the basis of the assessment. The projections for changes in population levels beyond 2025, up to 2045, for the purposes of the quantitative need assessment, will be outlined in Part 2 of the Study once the draft spatial development strategy for the SLP has been finalised.

4.17 Per capita spending on retail (convenience and comparison goods) and food/beverage purposes for each of the study area zones has been obtained from Experian. Use of separate forecasts for each zone enables the market share and store/centre turnover assessment to be informed by a socio-economic characteristics of the individual parts of the study area, in order to provide a more accurate picture of local retail and 'town centre' performance.

4.18 The spending data which has been obtained from Experian has a base date of 2023. This base date has been projected forward on the basis of forecasts contained within Experian's Retail Planner Briefing Note 22[27]. The forecasts which have been used are based upon Experian's annual adjusted convenience and comparison goods data. This version of the retail expenditure forecasts adjusts total growth/change to exclude purely online retail sales and has been used on the basis that the focus of the Study is on 'bricks and mortar' retail floorspace provision across the SLP[28]. The annual growth forecasts for convenience and comparison goods from 2023 to the present year (2025) are shown in Table 4.2 below. The table also provides information on the forecasts for retail and food/beverage spending per head post-2025 which will be used to inform Part 2 of the Study.

Table 4.2: % change per annum for per capita spending on convenience and comparison goods, plus food & beverage uses

Year	Convenience Goods Spending per Head (% change p.a.)	Comparison Goods Spending per Head (% change p.a.)	Food & Beverage Spending (% change p.a.)
2024	-1.9	-1.7	-1.6
2025	-0.9	-0.4	0.0
2026	-0.7	0.9	0.3
2027	-0.6	1.3	0.6
2028	-0.4	2.0	0.6
2029	-0.4	2.2	0.6
2030	-0.4	2.2	0.6
2031	-0.4	2.2	0.6
2032	-0.3	2.2	0.7
2033	-0.3	2.2	0.7
2034	-0.3	2.1	0.7
2035	-0.3	2.1	0.7
2036	-0.3	2.1	0.7
2037	-0.3	2.1	0.7
2038	-0.3	2.1	0.7

Source: Experian Retail Planner Briefing Note 22 (March 2025), Figure 1a and Appendix 3, Figure 7

[27] Published in March 2025
[28] Experian note that *"many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales".* Therefore, it is not appropriate to use total retail spending to calculate future demand for retail space; nor is it satisfactory to use retail spending excluding all online sales. Therefore, Experian calculate growth rates for convenience and comparison goods that take into account the proportion of online trading using traditional floorspace.

4.19 The above data shows that there is a year-on-year decline in spending per head on convenience goods between 2024-2025. This decline is equivalent to a loss of 2.8% of spending per capita over this two-year period. The data from Experian also shows a 2.1% decline in spending per head on comparison goods over the same period, whilst there is also a decline of 1.6% for food/beverage spending per head.

Gloucester

Overview

4.20 Since the completion of the 2021 Retail Study, there have been a number of notable changes in the retail and city centre landscape in Gloucester. Some of the key events and proposals can be described as follows:

a. The redevelopment of a large area, to the north of Kings Square and adjacent to the bus/coach station, known as 'The Forum', has now been completed. This large development provides a mixture of new office space, a four- star hotel (due to open in 2026) and a multi-storey car park with feature green wall.

b. Following its closure several years ago, the former Debenhams store adjacent to Kings Square has undergone complete refurbishment and has been transformed into a new campus for the University of Gloucestershire. The refurbished building contains a substantial amount of teaching and other education-related accommodation and will provide a new home for Gloucester Library[29] It is envisaged that the upper floors may also accommodate business or research uses.

c. Following the closure of its former storage, warehousing and distribution use, there have been a series of planning applications proposing the redevelopment of the former Interbrew site on Eastern Avenue. On 07.04.2025 planning permission was granted for the redevelopment of the site to provide a large Costco membership wholesale/retail warehouse. The permission also includes a new petrol station and tyre installation and sales.

d. Elsewhere on Eastern Avenue, there have been a number of planning applications and permissions for the conversion and change of use of existing retail warehouse premises. These proposals have arisen as a consequence of changes in the retail sector and the subsequent closure of stores.

e. Alongside a number of changes in the tenant line-up at Gloucester Quays, an application for the conversion of the first-floor area to provide new climbing walls and a soft play centre was approved by Gloucester City Council in May 2025. This proposal will add to the leisure elements of the Quays which already include a multi-screen cinema and food/beverage outlets.

f. The Peel Centre, which lies adjacent to Gloucester Quays, is a large retail park which has experienced mixed fortunes over the past decade. The cinema closed some years ago and permission was granted for Class A1 retail. The former Toys R Us unit closed and has been converted into a Padel Club, whilst Gloucester City Council has also issued a Lawful Development Certificate to confirm that the lawful use of several units at The Peel Centre is unrestricted Class E.

g. In recent years, new Lidl and B&M stores, along with a PureGym unit have been added to the collection of retail and main town centre land uses at Kingsway in Gloucester. These new stores, which lie adjacent to the A38,

[29] The relocated facility is due to open in October 2025.

provide a wide range of convenience and comparison goods provision for the local community which is expanding with new housing developments coming on stream in the area.

4.21 These changes are against a backdrop of the findings of the 2021 Retail Study which found that Gloucester city centre was vulnerable to even small levels of trade loss, with rising vacancies and falling levels of convenience and comparison goods turnover. The 2021 Retail Study also identified a need to re-focus the land use mix of the city centre away from its traditional retail offer (to a more mixed-use environment), with the Kings Quarter (The Forum) and Blackfriars regeneration projects comprising the first steps in this strategy. As part of the wider retail strategy for the city, The Peel Centre, Westgate and St Oswalds areas were identified as opportunities to provide a wider benefit to the city centre (albeit in a controlled manner and via improvements to existing linkages).

City Centre

4.22 Appendix A contains detailed information regarding the changing land use profile of Gloucester city centre over the period 2019 to 2025. The data, which is summarised in Table 4.3 below, provides the number of units and occupied floorspace within each of the main convenience and comparison retail and financial, retail and leisure service categories, along with the amount of uses/floorspace in each of the sub-sectors in each of these broad categories.

Table 4.3: land use profile of Gloucester city centre, 2019-2025 (units and floorspace)

Sector	2019				2025			
	Units		Floorspace (sq ft gross)		Units		Floorspace (sq ft gross)	
	No.	%	No.	%	No.	%	No.	%
Convenience	34	6.7	199,800	13.4	35	7.1	195,200	13.3
Comparison	145	28.6	490,300	32.9	133	26.9	468,550	31.9
Retail Service	82	16.2	111,600	7.5	80	16.2	105,500	7.2
Leisure Service	108	21.3	351,400	23.6	107	21.6	358,250	24.4
Financial Service	43	8.5	118,700	8.0	39	7.9	104,300	7.1
Vacant	95	18.7	217,900	14.6	101	20.4	238,600	16.2

Source: Appendix A. Figures may not add due to rounding.

4.23 The summary data in Table 4.3 indicates that the number and proportion of convenience goods retailers in the city centre has remained relatively static over the six years from 2019 up to 2025. In 2025, 7.1% of all surveyed units were in convenience goods retail uses, which is slightly below the national average of 9.3%. A similar situation occurs in relation to the amount of floorspace in convenience goods retail use (13.3% against a national average of 15.3%).

4.24 The number of comparison goods retailers in the city centre has dropped by 12 units between 2019 and 2025. In 2025, circa 26.9% of all surveyed units are in comparison goods retail use, which is commensurate with the national average of 26.1%.

4.25 There has been a small fall in the three categories of service uses in the city centre from 2019 up to 2025, with seven units lost. The proportion of uses in the financial and retail service categories is commensurate with their national average levels[30], although the proportion of leisure service uses in the city centre is below the national average[31].

4.26 In 2019 there were 95 vacant units in Gloucester city centre, which was equivalent to 18.7% of all surveyed units at that time. There has been a small increase in the number of vacancies since 2019 to 101 units (albeit the 2024 total vacancies stood even higher at 106 units). Therefore, in 2025 one in five units in the city centre are vacant. Given that the national average proportion of vacancies in town centres is 14.1%, this continued rise in vacant units in the city centre remains a cause for concern regarding the health of the centre.

4.27 The convenience goods market share and turnover data at Appendix C provides the following information for the city centre:

a. Zones 5a-5d of the study cover the urban area of the city, with city centre convenience stores achieving their highest market share in Zone 5a at 2.7%. For the other zones covering the city, the convenience goods market shares are 0.7% apiece in Zones 5b and 5c and 0.6% in Zone 5d.

b. Within the market share for Zone 5a, the majority of spending is directed towards the Iceland store in the city centre, with this store also attracting the majority of the spending from residents of Zones 5b, 5c and 5d.

c. The market share data at Table 4 also indicates that convenience stores in Gloucester city centre are attracting very small amounts of expenditure from Zones 1a, 1b, 1d, 3b, 4, 6, 9, 11 and 12 of the study area. The market share levels are 0.4% and below within these zones.

d. The ESI data indicates that convenience goods stores in the city centre are also attracting spending from outside of the study area. Based upon a proportion of overall spending, Table 5a at Appendix C indicates that 4% of the turnover of the Iceland store is from non-study area spending, whilst 17% of the turnover for other convenience goods stores in the centre is non-study area related.

e. Table 5a indicates that the amount of spending which convenience goods stores in the city centre derive from the study area is £6.8m (split between £1.3m for the Iceland and £5.5m for the other stores). When expenditure inflow is also accounted for, Table 5a indicates a total turnover of £7.7m for the city centre.

4.28 Table 6 outlines the market share of comparison goods stores in Gloucester city centre across the study area. Within the study area zones covering the Gloucester urban area[32], the city centre has a 11.7% share of spending in Zone 5a, falling to 5.4% in Zones 5b and 5d (apiece) and 6.9% in Zone 5c. Beyond these four core study area zones, the draw of the city centre is very limited, with a sub-1% market share in Zones 1a, 1b, 1c, 1d, 2, 3a, 3b, 4, 7 and 10. Slightly higher market shares are being achieved in Zones 6, 9, 11, 12 and 13, including a 4% share of spending (apiece) in Zones 6 and 11.

4.29 Table 7a at Appendix C translates the market share levels in Table 6 into a turnover forecast for the city centre. It forecasts a £77.8m turnover derived from study area residents, which can be increased to £87.7m when expenditure inflow (from outside of the study area) is accounted for. £56m of the total comparison goods turnover of the city centre is derived from residents of Zones 5a-5b, which is equivalent to 64% of total turnover.

[30] 8% and 16% respectively.
[31] 21.6% compared with the national average 26.5%
[32] Zones 5a-5d

4.30 Tables 8 and 10 at Appendix C outline the market share levels for food and beverage facilities in and around Gloucester city centre. The key headlines from this data are as follows:

a. The spending within the main historic city centre area at Class E(b) cafes and restaurants equates to market shares between 3% and 7% across the four study area zones covering the Gloucester urban area. The equivalent market shares for spending at take-aways and drinking establishments is between 2% and 5%.

b. Within the area surrounding the city centre area, market share levels are much higher, at 13%-25% for Class E(b) cafes/restaurants and 6%-19% for sui generis food/beverage establishments. These higher market share levels are likely to be driven by the significant amount of food/beverage floorspace at Gloucester Quays, Gloucester Docks and St Oswalds Retail Park.

c. Beyond the primary catchment of the Gloucester urban area, the available data at Tables 8 and 10 indicates that the areas surrounding the core city centre area (outlined in (b) above) have a wider and deeper catchment area. This is likely to be associated with the attractiveness of the adjacent retail facilities in these areas.

The Wider Gloucester Area

4.31 Within the wider Gloucester urban area, the comparison goods market share information provides specific data for Gloucester Quays and the (adjacent) Peel Centre, along with an aggregate market share for retail warehousing along Eastern Avenue. Figures for St Oswald's Retail Park, Quedgeley and Abbeydale are also provided, along with a residual figure for all other stores in the city.

4.32 The market share data at Table 6 and turnover data at Table 7a provide the following information regarding the catchment area, market penetration and financial performance characteristics of these non-city centre stores (which is also summarised in Table 4.4 below):

a. St Oswald's Retail Park. As a whole, stores at this retail park have forecast study area and total turnover levels (£77.2m and £87.8m respectively) which are very similar to the city centre (£77.8m and £87.7m). The market share data in Table 6 indicates that the retail park has a lower market share for comparison goods spending amongst residents of the Gloucester urban area zones (except for Zone 5d), but a higher market share across the wider study area (including Zones 1a-1d, 2, 4, 6, 7, 11, 12 and 13). This suggests that the range of goods available at the retail park is more attractive (than the city centre) across a wider area.

b. Gloucester Quays / Peel Centre. The retail warehouse area at The Peel Centre, along with the retail outlet centre immediately to the south, have long been recognised as a key attractor for shopping trips to Gloucester. This includes the dual characteristics of both competing with the core/traditional city centre area and also being able to attract shopping trips from the wider area than the city centre (due to the nature of the retail goods being sold). This is demonstrated by the contents of Table 7a at Appendix C which shows that the Quays/Peel centre area has a slightly lower study area turnover than the city centre[33]. In contrast, Table 7a shows a much larger level of expenditure inflow (of £26m), giving an overall comparison goods turnover for the Quays/Peel Centre of circa £97m. This is the largest turnover level for a single destination in the city.

c. Eastern Avenue. The contents of Table 6 at Appendix C indicates that the market share profile of comparison goods stores along Eastern Avenue is similar to that experienced by the city centre – i.e. a higher concentration of spending from Zones 5a-5d, alongside reasonably low levels of market penetration across the remainder of

[33] Albeit it is still third highest study area turnover level in Gloucester.

the study area. Table 7a forecasts a study area derived comparison goods turnover of £49.6m for Eastern Avenue, which is boosted by £4.5m to provide a total turnover of £54m.

d. Quedgeley. The retail park, to the east of the main part of the district centre at Quedgeley[34], has long been a popular comparison goods shopping destination in Gloucester. As noted above, its tenant line-up has changed over the past decade, although Table 7a at Appendix C indicates that the Quedgeley area is still able to attract £29.4m of comparison goods expenditure, which is boosted by a small expenditure inflow of £1.9m. Table 4 indicates that Quedgeley has a particularly strong market share in Zone 5b (6.7%) which is higher than the equivalent market share of the city centre and the Quays/Peel Centre.

Table 4.4: summary of turnover levels for the main comparison goods destinations in Gloucester (2025)

Destination	Study Area Derived Turnover (£m)	Expenditure Inflow (£m)	Total Turnover (£m)
Gloucester city centre	£77.8m	£9.8m	£87.7m
The Quays / Peel Centre	£70.6m	£26.0m	£96.6m
Eastern Avenue	£49.6m	£4.5m	£54.0m
Quedgeley	£29.4m	£1.9m	£31.4m
St Oswald's Retail Park	£77.2m	£10.6m	£87.8m

Source: Table 7a, Appendix C

4.33 Table 4.5 provides a summary of the study area, expenditure inflow and total turnover of the main foodstores and supermarkets in Gloucester located outside of the city centre boundary. It shows that the best performing stores are the Tesco stores at St Oswalds and Quedgeley, along with the Sainsburys stores at Barnwood and The Quays, plus the ASDA at Bruton Way.

[34] Which was bought by the Frasers Group in 2023

Table 4.5: summary of convenience goods turnover levels for the main foodstores / supermarkets in in Gloucester outside of the city centre (2025)

Destination	Study Area Derived Turnover (£m)	Expenditure Inflow (£m)	Total Turnover (£m)
Morrisons, Metz Way	17.9	1.3	19.1
ASDA, Bruton Way	30.3	2.2	32.5
Tesco, Quedgeley	45.6	2.2	47.8
ALDI, Quedgeley	10.1	0.4	10.4
Morrisons, Abbeydale	20.5	2.2	22.6
Tesco, St Oswald's	53.7	3.4	57.1
Lidl, Mercia Road	11.6	0.5	12.2
ALDI, Clifton Road	10.3	0.5	10.8
Lidl, Bristol Road	7.5	0.3	7.8
ASDA, Kingsway	15.9	1.5	17.4
Lidl, Kingsway	10.9	0.6	11.6
Sainsburys, Gloucester Quays	32.1	3.8	35.9
Tesco, Churchdown	10.0	0.7	10.7
ALDI, Hucclecote	16.3	0.8	17.1
Sainsburys, Barnwood	39.2	4.7	43.9
Lidl, Eastern Avenue	11.3	0.5	11.7

Source: Table 5a, Appendix C. Figures may not add due to rounding.

4.34 With regards to the catchment areas of these larger foodstores/supermarkets, the data contained at Table 4 at Appendix C indicates that their core catchments are largely concentrated upon Zones 5a-5d of the study area. This is unsurprising given that other parts of the study area will comprise the primary grocery shopping catchments for surrounding settlements, such as Cheltenham, Stroud and Tewkesbury. The one exception to this general catchment trend is the large Tesco supermarket at St Oswalds where it is able to attract 14% of spending from Zone 6 (Newent and the northern part of the Forest of Dean District) and 7.6% of spending from Zone 11 (Cinderford, Westbury-on-Severn, Newnham).

Summary

4.35 The review of the key retail characteristics of Gloucester city centre in this Study has confirmed many of the themes which were first established in the 2021 Retail Study. These include a higher than (national) average vacancy rate, which has now increased further over the past few years. At the present time, one in five retail and service units in the city centre are now vacant which should now be confirmed as a long-term characteristic which requires addressing through planning policy in the SLP.

4.36 Since the previous (2021) retail study, the number of comparison goods retailers in the city centre has again fallen and there has also been a reduction in the number of service uses. The reasons for this performance have been highlighted in previous evidence base studies and are likely to be a combination of national trends and local circumstances. In our opinion, a key influence on the performance of the historic part of the city centre is the scale of competition posed by other retail and leisure provision elsewhere in the city. Whilst there are reasons to suggest that the Gloucester Quays retail outlet centre (and associated leisure provision) has the potential to benefit the city centre through linked trips, the

Quays nevertheless provides competition for shops and services along the four 'gate streets' in the city centre and the purpose-built shopping centres. Further significant competition comes from Eastern Avenue, St Oswald's Retail Park and Quedgeley district centre, along with the proximity of Cheltenham.

4.37 Rather than simply viewing the problems experienced by the city centre's retail sector as a negative issue for the city centre, the availability of surplus retail space should be seen as a clear opportunity for the future of strategic planning policy for the centre. The foundations for this strategy have already been laid with the development of The Forum area, which has provided a significant amount of office, hotel and other commercial space in a part of the city which was previous identified for retail-led mixed-use development. Similarly, the refurbishment of the former Debenhams department store building by the University of Gloucester is a superb example of the re-use of a large-scale retail unit. The new University building, which opened in August 2025, is likely to bring a large number of day-time visitors to the city centre, which can help support the health of the centre.

4.38 As noted above, the Quays/Docks area has occupied a unique position in the Gloucester retail market for a number of years. Whilst the retail outlet centre has been proven to bring new visitors to the city (including positive impacts of spin-off benefits), there is a likelihood that the outlet centre is also viewed as an alternative mainstream comparison goods shopping destination to the city centre. It is also clear that the Quays/Docks area is now the pre-eminent location for food/beverage visits/spending in the city. The Quays has therefore had a major influence on the city centre but now faces its own challenges in relation to the new retail outlet centre in Ashchurch. It is unusual for an area such as the SLP area to have two retail outlet centres and there is the possibility that the Ashchurch facility, given its proximity to the M5, will pose significant competition to The Quays. This, therefore, requires careful consideration and should, in our opinion, be a key topic for the planning strategy/policy analysis in Part 2 of this Study.

Cheltenham

Overview

4.39 The 2021 Retail Study confirmed the position of Cheltenham as the strongest of the three main 'town centres' in the SLP area, with the town centre possessing high proportions of comparison goods retail and service uses and a falling vacancy rate. The study also confirmed that Cheltenham attracts the largest amount of comparison goods expenditure across the SLP area in relation to both in-centre and out-of-centre retail provision.

4.40 The 2021 Retail Study recommended that, based upon the scale of existing floorspace and previous changes/additions to floorspace provision, there was no requirement to plan for net additional comparison goods floorspace. It also recommended that the capacity for net additional convenience goods floorspace should be directed to the town centre and the planned new centres within the urban extensions.

4.41 Since the completion of the 2021 study there have been a number of events which have had an influence on retail land use provision, and wider 'town centre' issues, across the Cheltenham area.

a. The Lidl store on the northern edge of the town centre has relocated from Grosvenor Place to Swindon Road, on a site formerly occupied by Matalan.

b. There have been a number of changes to the collection of large retail units along Tewkesbury Road, which includes the conversion of the former Homebase unit at Centrum Park into three separate units. These units are now occupied by Dunelm, The Range[35] and, most recently, a Marks & Spencer Food store. In addition, there have been changes to Gallagher Retail Park, including the sub-division of the DFS unit to retain DFS and

[35] Which was a relocation from a previous The Range store elsewhere on Tewkesbury Road

introduce Sofology[36], along with the introduction of Matalan (to replace Outfit), TUI (to replace EE), and Tapi and Dreams (to replace Carpetright).

c. A new ALDI foodstore has been constructed on Corinthian Way at The Reddings (along with a Costa unit), following the grant of planning permission at appeal. A new Lidl store has also been constructed on Cirencester Road.

d. Following the submission of planning applications in 2016, CBC and TBC resolved (in May 2025) to grant outline planning permission for the large residential-led mixed use development at Elms Park (which is also known as 'North West Cheltenham'[37]. This area is subject to one of the strategic land use allocations in the JCS and the current planning application includes the provision of new local and neighbourhood centres[38]. These centres are proposed to accommodate up to 6,150sq m of retail, service and food/beverage floorspace and up to 3,000sq m of leisure/community uses.

e. CBC has recently resolved[39] to grant planning permission for a mixed (residential and employment) land use development at West Cheltenham[40], which covers a large part of the Policy A7 allocation in the JCS. In addition to the provision of up to 576 new homes, the non-residential element of the proposal includes the following main town centre uses: (a) 2,219sq m of Class E(a) retail floorspace; (b) 4,092sq m of Class E(b) food and beverage floorspace; (c) 758sq m of Class E(c) services floorspace; (d) 1,895sq m of sport and recreation floorspace (Class E(d)); (e) 1,516sq m of Class E(e) health and medical land use floorspace; (f) 1,147sq m of floorspace for Class E(f) creche/day nursery uses; (g) circa 760sq m of Class F floorspace; and (h) circa 2,000sq m of sui generis food and beverage floorspace. Apart from the controls offered by a strategic level land use parameters plan, the officer's report to CBC's planning committee did not recommend any specific controls over the proposed Class E and other main town centre land use floorspace. As a consequence over 10,000sq m of Class E floorspace, which has the potential to be unrestricted, could be provided as part of this West Cheltenham development. In addition to planning application 23/01875/OUT, there are two further undetermined planning applications in the West Cheltenham area (22/0817/OUT[41] and 24/01268/OUT[42]). Both of these applications also propose to provide main town centre land uses.

f. Following the decision to place CBC's Municipal offices on The Promenade on the market in September 2024, it was announced in May 2025 that the preferred bidder for the site was Almiranta Capital ('AC'). AC have indicated their intention to transform the offices into a large 125-room hotel and associated spa / event space.

4.42 The above proposals, particularly (d) and (e) have the potential to materially influence the assessments of need for retail floorspace within Part 2 of the Study. In particular, whilst the provision of new local centres was included within the overall spatial planning strategy in the JCS, the scale of floorspace in each of the planned new centres was not defined. However, it has become clear from the content of the West Cheltenham and Elms Park applications (which have resolutions to grant planning permission) that both projects have the potential to add a significant amount of retail and main town centre land use floorspace (which will not have been accounted for in the preparation of the JCS and subsequent evidence base studies).

[36] Including the insertion of mezzanine floors in the DFS and Sofology units
[37] See Policy A4 in the JCS
[38] A Within Part 5(iv) of Policy SD2
[39] In July 2025
[40] CBC planning application reference: 23/01875/OUT.
[41] Midlands Land Portfolio and St Modwen
[42] Planning application by NEMA

Town Centre

4.43 Appendix A contains a detailed set of land use data, across the retail and service sectors, for Cheltenham town centre between 2019 and 2025. The key headline data for the convenience and comparison retail and leisure/retail/financial services uses is summarised in Table 4.6 below.

Table 4.6: land use profile of Cheltenham town centre, 2019-2025 (units and floorspace)

Sector	2019				2025			
	Units		Floorspace (sq ft gross)		Units		Floorspace (sq ft gross)	
	No.	%	No.	%	No.	%	No.	%
Convenience	42	6.1	82,800	4.8	42	6.1	71,071	4.2
Comparison	217	31.6	738,200	42.7	192	28.1	580,487	33.9
Retail Service	105	15.3	109,400	6.3	111	16.3	107,747	6.3
Leisure Service	194	28.3	521,900	30.2	218	31.9	573,336	33.5
Financial Service	60	8.7	113,700	6.6	48	7.0	126,350	7.4
Vacant	68	9.9	161,800	9.4	72	10.5	251,299	14.7

Source: Appendix A. Figures may not add due to rounding.

4.44 The land use survey data indicates that there has been no change in the overall number of convenience goods uses in Cheltenham town centre between 2019 and 2025. The 42 occupied units are equivalent to circa 6% of the total number of surveyed units in the town centre and below the national average of 9.3%. Whilst the number of convenience goods retailers within the town centre has remained the same, there has been a reduction in the amount of occupied floorspace, from circa 83,000sq ft (7,711sq m) to circa 71,000sq ft (gross (6,596sq m) ground floor area). Convenience goods floorspace in the town centre in 2025 occupies 4.2% of all surveyed floorspace, which is considerably lower than the national average of 15.3%. This indicates that the town centre continues to play a limited convenience goods shopping role, with the size of the existing stores within the centre small scale and orientated towards top-up food shopping.

4.45 Since 2019 there has been a noticeable drop in the overall number of comparison goods retailers within the town centre, with a fall from 217 units (31.6% of all units) in 2019 to 192 (28.1% of all units) in 2025. However, this proportion of units remains slightly above the national average (28%) a characteristic which is also true for the amount of floorspace occupied for comparison goods retailing.

4.46 Whilst financial and business service uses in the town centre have followed the national trend of decline, the number of retail and leisure services uses have increased from 2019 up to 2025. The proportion of uses in these two categories is also above their respective national averages, with the size of the leisure services sector now larger than the comparison goods retail sector in the town centre. A key driver in the success of this sector is the number of food and beverage outlets in the town centre. Indeed, one third (33.5%) of all surveyed floorspace in the centre is occupied by leisure services, which is in contrast to the national average floorspace proportion for this sector of 27.7%.

4.47 From 2019 up to 2025, vacancies in Cheltenham town centre have seen significant variation. Whilst there has been a small rise between the surveys in 2019 and 2025, it should be noted that vacancies peaked at 94 units in 2024. At the present time, the 72 vacant units within the centre comprise 10.5% of all surveyed units which is well below the national average of 14.1%. The amount of vacant floorspace within the centre (14.7%) is commensurate with the national average of 14.5%.

4.48 With regards to shopping patterns associated with Cheltenham town centre, Table 4 at Appendix C provides market share information for existing convenience stores in the centre. It shows that, apart from a limited amount of convenience goods expenditure being attracted from 2, 3b and 4, the main grocery shopping catchment for the town centre is limited to the four study area zones which cover the Cheltenham urban area[43]. Within these zones the market share of town centre stores is modest and is summarised in Table 4.7 below. It indicates a market share of between 1%-2% across the four Cheltenham-focused study area zones. In the interests of comparison, the table also shows the convenience goods shopping market shares of the three district centres in Cheltenham, showing that in parts of the town, particularly Zones 1b, 1c and 1d, the district centres are able to attract higher spending levels amongst local residents.

Table 4.7: convenience goods shopping market shares for Cheltenham town centre and the district centres in Cheltenham – Zones 1a-1d

	Zone 1a	Zone 1b	Zone 1c	Zone 1d
Cheltenham town centre convenience stores	2.5%	1.4%	1.4%	2.1%
Bath Road	0.9%	0.4%	6.8%	4.3%
Coronation Square	0.1%	2.6%	0.0%	0.3%
Caernarvon Road	1.5%	2.5%	11.3%	16.6%

Source: Table 4, Appendix C.

4.49 Table 5a at Appendix C provides the forecast turnover of convenience goods stores in the town centre. It indicates that stores[44] draw £9.1m from the study area, which is boosted by a further £2.0m of expenditure inflow to provide a total turnover of £11.1m. It will be noted from the contents of Table 5a that, apart from the Iceland store, between one fifth and one quarter of turnover for town centre foodstores derives from expenditure flowing from outside of the study area.

4.50 With regards to comparison goods shopping, Table 6 at Appendix 6 shows that Cheltenham town centre has a significant catchment area which extends across the entirety of the study area. The market penetration of the comparison goods sector can be organised into three broad categories:

a. Primary catchment area – Zones 1a, 1b, 1c, 1d, 2, 3b, 4. Within these zones, the town centre's comparison goods sector has a market share of at least 10%, with the share rising to 18%-19% in Zones 1a, 1c and 1d.

b. Secondary catchment area – with Zones 3a, 5c, 5d and 7 the town centre has an overall market share of at least 4% in each zone

c. Tertiary catchment – 5a, 5b, 6, 8, 9, 10 and 11. Within these zones, the town centre has a market share of between 2%-3%.

4.51 Turning these study area market shares into turnover levels, Table 7a at Appendix C forecasts that Cheltenham town centre has a study area derived turnover of £196.7m. Around half (£95.9m) of this study area derived turnover is drawn from the four Cheltenham zones (1a-1d). Table 7a (and Table 4.8 below) also indicates that 29% (£57m) of Cheltenham town centre's comparison goods turnover is drawn from people residing outside of the study area.

[43] Zones 1a, 1b, 1c and 1d
[44] Iceland, Sainsburys, two Tesco stores and other smaller convenience stores in the centre.

Table 4.8: summary of turnover levels for the main comparison goods destinations in Cheltenham (2025)

Destination	Study Area Derived Turnover (£m)	Expenditure Inflow (£m)	Total Turnover (£m)
Cheltenham town centre	£196.7m	£57.0m	£253.7m
Coronation Square	£1.8m	£0.1m	£1.9m
Bath Road	£4.3	£0.6m	£4.9m
Tewkesbury Road / Kingsditch	£128.1	£18.5m	£146.6m
Other, Cheltenham	£114.4	£21.6m	£136.0m

Source: Table 7a, Appendix C

4.52 With regards to spending at food and beverage destinations, Cheltenham town centre has a comparatively high market share. Within the study area zones which cover the Cheltenham urban area the town centre has a market share of between 16% to 23% for spending at Class E(b) food/beverage uses. Within this category of spending, the centre's catchment area is reasonably extensive, with reasonably high levels of market share in Zones 2, 3b, 4, 5c, 5d and 7. Table 9a forecasts that the total study area derived turnover of Class E(b) food/beverage uses in the town centre is circa £48m, with a further £26m per annum being attracted from outside of the study area.

4.53 For spending at take-aways and drinking establishments, the town centre's market shares across the Cheltenham urban area zones are not quite as high as the café-restaurant levels but are nevertheless between 7%-12%.

The Wider Cheltenham Area

4.54 Looking outside of the town centre, comparison goods stores elsewhere in Cheltenham are also, collectively, able to attract a large proportion of spending. Table 4.9 below indicates that the collective market share of out of centre stores is very similar to the town centre in Zones 1a, 1c and 1d, but higher than the town centre in Zone 1b. As can be seen from Table 4.9 below, the collection of stores around Tewkesbury Road / Kingsditch comprise a particularly attractive comparison goods shopping destination.

Table 4.9: comparison goods shopping market shares for Cheltenham town centre and the district centres in Cheltenham – Zones 1a-1d

	Zone 1a	Zone 1b	Zone 1c	Zone 1d
Cheltenham town centre	18.7%	12.6%	19.7%	18.9%
District centres	0.6%	1.0%	1.1%	0.9%
Tewkesbury Road / Kingsditch	9.4%	17.7%	5.9%	7.1%
Other comparison stores in Cheltenham	10.3%	11.3%	10.9%	11.8%

Source: Table 4, Appendix C.

4.55 Table 4.9 above outlines the study and total turnover levels for comparison goods in district centre and out of centre locations in Cheltenham. When combined with the contents of Table 4.8, three characteristics are particularly important to note. First, the collective study area derived turnover of out of centre comparison goods stores in Cheltenham (£242.5m) is higher than the town centre (£196.7m). Second, out of centre stores have a smaller level of expenditure inflow than the town centre, although this element still comprises between 15% and 20% of total turnover. Third, out of centre stores in Cheltenham have a similarly wide catchment area profile as the town centre, with around half of study area derived turnover flowing from the non-Cheltenham zones in the study area.

4.56 Table 4.10 below provides a summary of the study area and total turnover levels of the main foodstores and supermarkets in Cheltenham.

Table 4.10: summary of convenience goods turnover levels for the main foodstores / supermarkets in Cheltenham outside of the city centre (2025)

Destination	Study Area Derived Turnover (£m)	Expenditure Inflow (£m)	Total Turnover (£m)
Waitrose, Honeybourne Way	42.4	3.2	45.6
Lidl, Swindon Road	7.4	0.5	8.0
ALDI, Tewkesbury Road	12.3	0.7	13.0
ASDA, Hatherley Lane	30.7	2.2	32.9
Tesco, Collets Drive	48.1	3.1	51.2
Marks & Spencer, Tewkesbury Road	2.3	0.2	2.5
Lidl, Tewkesbury Road	7.8	0.3	8.2
Sainsburys, Tewkesbury Road	39.7	3.8	43.4
Sainsburys, Oakley	29.8	1.3	31.2
Lidl, Cirencester Road	8.6	0.4	9.1

Source: Table 5a, Appendix C. Figures may not add due to rounding.

4.57 In order to achieve the turnover levels outlined in Table 4.10 above, Table 4 at Appendix C indicates that the core catchment area for these stores comprises Zones 1a-1d with the most popular stores able to extend their catchment into Zones 2, 3b, 4 and 7. The larger stores are also able to attract between 5%-10% of their turnover from outside of the study area.

Summary

4.58 The foregoing analysis has been able to confirm a number of key characteristics about Cheltenham town centre. First, the centre remains a very popular and financially successful destination, with the highest turnover in the SLP area. The catchment area of the town centre for comparison goods shopping is wide, which is no doubt influenced by a wide range of non-food stores in the centre. Like Gloucester, Cheltenham town centre does face stiff competition from out of centre stores, although the evidence suggests that it is able to better withstand this aspect of competition. The food/beverage sectors in the town centre are also particularly strong, with a robust financial performance and an attractiveness which extends well beyond the study area. This is no doubt heavily influenced by the events held by Cheltenham throughout the year including those organised by Cheltenham Festivals and the horse racing festival.

4.59 One particular notable feature of the land use mix in the town centre is that the leisure services sector is now the largest sector, with around one third of all occupied units. This aspect of the hospitality sector is also boosted by the quality and (potentially expanding) quantity of hotel rooms in the town centre. This focus is aligned to the town's all year-round attractiveness, which is regularly boosted by the annual events outlined above. Indeed, the demand for hotel space is growing with the potential for the Borough Council's municipal offices on the Promenade to be sold and converted to a large new hotel.

4.60 Outside of the town centre there have been a number of changes in retail provision since the completion of the 2021 Retail Study, although none have made a significant change to the overall retail landscape within the town. However, as already mentioned in relation to Gloucester, the opening of the retail outlet centre at Ashchurch has the potential to impact upon the financial performance of Cheltenham town centre, with a proportion of residents in the core of Cheltenham turning to the outlet centre for part of their comparison goods shopping requirements. This is a further reason why the initial impacts of the outlet centre should be monitored through the short to medium term.

4.61 A further potential change to the future amount and balance of retail and main town centre land use provision will be the level of new floorspace in the planned new local centres within the JCS strategic allocations. The key allocations in Cheltenham are North West Cheltenham (Elms Park) and West Cheltenham, both of which have been subject to outline planning applications (which have secured resolutions to grant permission from CBC). Both of these projects, combined, have the potential to add circa 16,000sq m of main town centre land use floorspace with very few controls over the future use of that floorspace[45].

Tewkesbury

Overview

4.62 The findings of the 2021 Retail Study pointed towards a town centre in Tewkesbury which had a land use mix in broad conformity with the national average at that time, alongside a trend for rising vacancies within the centre. The 2021 study considered whether this was a sign of an over-provision of retail floorspace within the town centre, particularly comparison goods floorspace.

4.63 The recommendations of the 2021 Retail Study indicated that there was no overall need (across Ashchurch and Tewkesbury as a whole) to plan for new convenience goods retail floorspace, although the study did highlight an area-specific requirement for new provision should the Tewkesbury Garden Communities come forward.

4.64 In relation to comparison goods retail provision in the Tewkesbury and Ashchurch area, the key focus was on the new retail outlet centre at Ashchurch. The 2021 study described how the outlet centre had the potential to have a material impact on comparison goods shopping patterns across the Tewkesbury/Ashchurch, Cheltenham and Gloucester area, including three key effects: (a) the potential effects on Tewkesbury town centre’s comparison and food/beverage functions, given its proximity to the outlet centre (and the potential for the latter to become a rival retail and leisure destination); (b) the general wider effects on comparison goods shopping trips in Cheltenham and Gloucester, due to the scale of the retail outlet centre and its partial trading overlap with these two ‘town centres’; and (c) specific impacts upon Gloucester’s own retail outlet centre (given the like-for-like nature of provision) and the wider knock-on effects for Gloucester.

4.65 The retail outlet centre opened in Summer 2025. This comprises phase 1 of the outlet, with a second phase, of circa 25 additional units, planned. Therefore, whilst its retail floorspace content can be described within this Study, it is too early to understand its effects/impacts upon comparison goods spending patterns across the SLP area and also its impact on spending at food/beverage destinations in Tewkesbury, Cheltenham and Gloucester. However, the timing of the preparation of this Study does allow a baseline trading pattern to be established, given that the retail and food/beverage outlet spending data which has been provided by ESI for the whole calendar year prior to the opening of the outlet centre

[45] It should be noted that those strategic allocations in the JCS which include provision of a new local centre have not set any limit on the amount of main town centre land use floorspace which can potentially be provided.

(2024). This provides the opportunity for the collection of further spending data in 2 years time[46]. A description of the current content of the Ashchurch retail outlet centre can be found later in this sub-section.

Town Centre

4.66 Table 4.11 below provides a summary of the land use profile of Tewkesbury town centre between 2019 and 2025 and draws upon more detailed land use survey data in Appendix A to this document. The land use data contained in Table 4.11 is based upon Experian GOAD's 2019 survey of the town centre and the Nexus update (in 2025) to the most recent Experian survey of the centre in 2024.

Table 4.11: land use profile of Tewkesbury town centre, 2019-2025 (units and floorspace)

Sector	2019				2025			
	Units		Floorspace (sq ft gross)		Units		Floorspace (sq ft gross)	
	No.	%	No.	%	No.	%	No.	%
Convenience	18	8.1	39,300	10.6	16	7.6	37,300	11.1
Comparison	61	27.4	117,600	31.7	64	30.5	117,890	35.0
Retail Service	34	15.2	35,100	9.5	35	16.7	38,475	11.4
Leisure Service	50	22.4	93,600	25.3	56	26.7	81,920	24.3
Financial Service	25	11.2	38,700	10.4	20	9.5	29,291	8.7
Vacant	35	15.7	46,100	12.4	19	9.0	31,904	9.5

Source: Appendix A. Figures may not add due to rounding.

4.67 The summary data in Table 4.11 above indicates a small reduction in the number of convenience goods retailers and financial/business service providers in Tewkesbury town centre over the past five years. The fall in the proportion of convenience goods retailers in the centre (to 7.6% in 2025) means that the gap against the national average (9.3%) has widened to almost two percentage points. However, despite the fall in the number of units, the proportion of financial service uses in the town centre (9.5%) remains above the national average of 7.9%.

4.68 Unlike the other two large 'town centres' in the SLP area, Tewkesbury town centre has experienced a small rise in the number of comparison goods retailer, from 61 in 2019 to 64 in 2025. In 2025, comparison goods retailers occupied 30.5% of all surveyed units in the town centre which is above the national average of 26.1%. The proportion of retail and leisure uses within the centre is also similar to national average levels, with small increases in the number of uses in these categories since 2019.

4.69 A key change in the land use profile of Tewkesbury town centre over the period 2019 to 2025 has been the considerable reduction in overall vacancy rates, from 35 units in 2019 to 19 in 2025. The proportion of vacant units (9%) in 2025 is well below the national average of 14.1%.

[46] When assessing the potential impact of planning application proposals for retail / leisure land uses, the PPG notes that: *"The design year for impact testing will need to be selected to represent the year when the proposal has achieved a 'mature' trading pattern. This is conventionally taken as the second full calendar year of trading after the opening of each phase of a new retail development, but it may take longer for some developments to become established*". We consider that the same principles can be applied to a 'before and after' study for the Ashchurch retail outlet centre, with, for example, shopping patterns data collected in 2027.

4.70 With regards to the influence of convenience goods retail floorspace on local shopping patterns, Table 4 at Appendix C indicates this to be relatively limited when compared with out of centre provision within the town and spending on groceries in the wider area. Table 4 shows that within Zone 7 (the zone in which Tewkesbury and Ashchurch are located) the Tesco store in the town centre has a market share of 3.1%. Other convenience goods stores in the town centre have a 1.1% market share amongst Zone 7 residents. Table 4 indicates that the catchment area of foodstores in the town centre has limited influence beyond Zone 7 with very limited spending being drawn from Zones 2, 6 and 8 (all of which is associated with the Tesco store). Based upon these market shares and a modest amount of expenditure inflow, Table 5a at Appendix C forecasts an annual convenience goods turnover for the Tesco store of £5.3m, alongside a collective turnover of £2.0m for other convenience goods stores in the centre.

4.71 Table 6 at Appendix C indicates that the market share of comparison goods stores in Tewkesbury town centre amongst Zone 7 residents is 5.1%. This can be compared with a market share, amongst Zone 7 residents, for other out of centre stores in Tewkesbury/Ashchurch of 1.8%. Table 6 also indicates that Tewkesbury town centre is drawing a small amount of trade from residents of the Cheltenham urban area, along with a 0.4% share of spending from Bishops Cleeve (Zone 2). The town centre also has a sub-0.5% share of comparison goods spending in Zones 3b, 4, 5c, 5d, 6 and 8 of the study area.

4.72 Table 8 provides a summary of Tewkesbury town centre's share of spending at Class E(b) food/beverage uses and indicates that the centre is able to attract 10% of spending from residents of Zone 7. Table 8 also indicates that the centre is able to attract a small market share across other zones in the study area although this is below 1% in all case. The highest non-Tewkesbury market share is 0.9% in Zone 2 (Bishops Cleeve). Table 9a forecasts a study area derived turnover of £6.2m along with a healthy level of expenditure inflow (£2.9m) which is equivalent to 46% of study area derived turnover. A similar level of expenditure inflow occurs in relation to spending at sui generis food/beverage)take-aways and drinking establishments) in the town centre, which (as shown by Table 11a) have a total turnover of £13.6m.

The Wider Tewkesbury / Ashchurch Area

4.73 Out of centre convenience goods retail provision in Tewkesbury is dominated by two stores: Morrisons and ALDI. Table 4 at Appendix C indicates that the Morrisons store has a 14.1% share of convenience goods spending within Zone 7 and also attracts 0.7% of spending from Bishops Cleeve residents (Zone 2) and Zone 6 (Newent). The ALDI store, which lies to the south of the town centre, has an 8% share of convenience goods spending in Zone 7, along with a 0.3% market share in Zone 2 and 0.8% share of spending in Zone 6. Table 5a forecasts that the study area derived turnover of the Morrisons store is circa £24.1m, which is around twice as high as the ALDI (£12.7m). Based upon the spending data provided by ESI, it is notable that the Morrisons store has a reasonably large level of expenditure inflow from outside ofthe study area (£3.3m, or 14% of store turnover).

4.74 When combined with the town centre market share, Table 4 indicates that existing foodstores retain around one third of convenience goods spending in Zone 7. Cheltenham is a key beneficiary of the spending, which is lost from Zone 7 facilities, particularly the Sainsburys store on Tewkesbury Road.

4.75 Out of centre comparison goods retail floorspace is largely concentrated in Ashchurch, to the east of the M5. Retail provision has been expanded in recent years with the opening (in 2022) of a large Dobbies garden centre, immediately adjacent to Junction 10 of the M5. Table 6 indicates an overall market share of 1.8% for out of centre comparison goods retailing amongst Zone 7 residents. This is supplemented by small (sub-0.5%) market shares in Zones 2, 5d, 6 and 8. Table 7a indicates out of centre stores in Tewkesbury/Ashchurch attract £5.7m of comparison goods expenditure from study area residents, although this is boosted by a further £8.0m as a consequence of spending originating from outside of the study area.

4.76 It is likely that a key influence over this large amount of expenditure inflow will be the Dobbies garden centre, given the nature of the use, its position within the study area and its proximity to the M5 motorway. This is likely to set the scene for the trading characteristics of the recently opened retail outlet centre which opened for trade earlier this year.

4.77 In addition, there is, at the time of preparing this Part 1 report a current planning application[47] for a new Lidl store at Ashchurch. The detailed effects of this proposed store have yet to be assessed by TBC, although it is likely that the proposed store will divert a large amount of trade from the other two out of centre foodstores in Tewkesbury (ALDI and Morrisons) and also have an effect on the relationship between the convenience goods shopping catchment areas of Tewkesbury/Ashchurch and Bishops Cleeve[48].

Summary

4.78 The updated evidence base information for the Tewkesbury and Ashchurch area has shown that there has not been a significant change in the overall characteristics of Tewkesbury town centre since the 2021 Retail Study. The town centre continues to have relatively modest market share levels for convenience and comparison goods shopping, across a reasonably limited catchment area. Unlike the other two large town centres in the SLP area, Tewkesbury has not experienced a fall in the proportion of comparison goods retailers in the centre over the past five years and only modest changes have occurred in the retail and service sectors. The one notable change is a fall in the vacancy rate in the town centre. The proportion of vacant property in the town centre was a cause for concern in the 2021 Retail Study, although the proportion in 2025 is well below the national average.

4.79 The wider Tewkesbury/Ashchurch area is now starting to experience the impact of the Ashchurch retail outlet centre to the east of the M5. Whilst this centre only opened for trade during the course of preparing this Part 1 Study report, the opening of the adjacent large garden centre has provided useful information regarding the split between local and non-local expenditure. In particular, it is clear from the latest spending data that the turnover of out of centre stores in Tewkesbury/Ashchurch are now gaining a large proportion of trade from outside of the study area used in this assessment. In order to understand whether the (recently opened) retail outlet centre will continue this trend, it is recommended that further spending data is gathered (to inform the SLP retail and 'town centres' evidence base) once the outlet centre has reached a settled trading pattern.

Bishops Cleeve

4.80 Table 4.11 below provides the results of the land use survey of the retail and service uses in the defined centre boundary in Bishops Cleeve, undertaken by Nexus in Summer 2025. In the interests of consistency, the same classification method as the 2021 Retail Study has been utilised.

[47] 25/00521/FUL
[48] Which is also being affected by the proposed new ALDI store in Bishops Cleeve.

Table 4.11: land use profile of Bishops Cleeve village centre, 2019-2025 (units and floorspace)

Sector				
	2019		**2025**	
	No.	**%**	**No.**	**%**
Convenience	4	10.0	4	12.1
Comparison	9	37.5	8	24.2
Service	23	38.8	20	60.6
Vacant	2	12.5	0	0.0
Misc	1	1.2	1	3.0
Total	39	100	33	100

Source: Nexus survey, Summer 2025 & 2021 Retail Study. Figures may not add due to rounding.

4.81 The defined centre at Bishops Cleeve is dominated by two foodstores: Tesco and Lidl. These stores attract a significant number of trips to the centre and are likely to benefit the centre through the provision of large amounts of surface level car parking and also via linked trips with other parts of the centre. A significant proportion of the other uses in the centre are service uses, with a high number of hair salons and food/beverage outlets. There is also a Post Office in the centre.

4.82 Tables 4 and 5a at Appendix C provides the following market share and turnover information for convenience goods stores in Bishops Cleeve:

a. Overall, stores in Bishops Cleeve are able to attract a 44% market share amongst spending from Zone 2 residents.

b. The dominant foodstore is the Tesco in the village centre which attracts a 32% share of spending in Zone 2 and is also able to gain market share in Zones 1a (4.6%), 1b (1.2%), 1c (0.4%), 1d (0.3%), 3b (7.4%) and 7 (2.5%). The total aggregate market shares across the study area contribute to a study area derived turnover for Tesco of £33.4m, which is boosted by a further £1.1m of expenditure inflow.

c. Table 5a at Appendix C indicates that the study area derived turnover of the Lidl store in the village is £9.6m, boosted by small additional (expenditure inflow) allowance of £0.3m. In order to achieve this study area derived turnover, the Lidl store has a 9.3% market share in Zone 2, along with attracting 4.6% of spending from Zone 1a residents. Like the Tesco store, the Lidl also attracts convenience goods spending from Zone 7 where is has a 0.9% market share.

d. According to the contents of Table 4 at Appendix C, the catchment area of other stores in Bishops Cleeve is largely restricted to Zone 2 residents.

e. In addition to the 18% market share for online spending and 15% of spending being directed to stores outside of the SLP area, Table 4 indicates that around 20% spending from Zone 2 residents is currently being directed to stores in Cheltenham (including the Waitrose, Tesco at Collets Drive, Sainsburys on Tewkesbury Road and ALDI on Tewkesbury Road).

4.83 With regards to comparison goods spending and market shares, Table 6 at Appendix C indicates that just under 5% of expenditure generated by residents of Zone 2 is retained by stores in Bishops Cleeve. The village centre is also able to attract small amounts of spending from the four Cheltenham study area zones, along with residents of Zone 3b. Table 6 also shows that around 30% of comparison goods spending from Zone 2 residents is flowing to stores in Cheltenham, whilst 42% is directed towards online shopping.

4.84 In relation to current retail development proposals, it is to be noted that TBC has recently resolved to grant planning permission for a new ALDI store[49] on land in the south-western part of the Bishops Cleeve urban area. Whilst, at the time of preparing this document, formal planning permission has not yet been issued, TBC has concluded that the proposed ALDI store will meet the provisions of the sequential test and will not have a significant adverse impact upon the health of, or investment within, Bishops Cleeve's defined rural service centre.

4.85 Assuming that planning permission is granted and the implementation of the proposal proceeds, then the following effects are likely to be felt by the Bishops Cleeve retail catchment:

a. Whilst there is already choice and competition within the grocery retail sector in Bishops Cleeve, this will be expanded by the introduction of the proposed ALDI. This is likely to result in a reduction in the amount of convenience goods spending flowing from residents of Bishops Cleeve to stores in Cheltenham and also have a material effect upon the overlapping shopping catchments of Bishops Cleeve, Ashchurch and Tewkesbury.

b. Within Bishops Cleeve there will, as identified during the consideration of the ALDI application, be a large diversion of (convenience goods) trade from the Tesco and Lidl stores in the defined village centre to this new out of centre location.

c. Finally, the store, which should now be treated as a commitment for the purposes of the need assessments in Part 2 of this Study, will now be part of the demand/supply balance for retail floorspace in Bishops Cleeve and reduce the amount of retail expenditure which can be made available to support existing and future floorspace in Cheltenham, Ashchurch and Tewkesbury.

Winchcombe

4.86 Land use data for Winchcombe town centre for 2019 and 2024 has been obtained from Experian GOAD and updated by Nexus to provide an up to date (2025) survey of land uses. This data is contained at Appendix A to this report and can be summarised as follows:

a. There have been no changes in the overall number of convenience goods retailers in the centre, with the proportion 10.2% remaining slightly above the national average (9.3%).

b. The number of comparison goods retailers in the centre has reduced slightly, from 22 in 2019 to 21 in 2025. Comparison goods retailers occupy just over one third of all surveyed units in the centre, which is well above the national average of 26.1%.

c. There has also been a reduction of just one unit (each) in the retail service, leisure service and financial/business service categories. The proportion of retail service uses in Winchcombe is similar to the corresponding national average, although the proportions of leisure service and financial service uses are below average.

d. The number of vacant retail and service properties in the centre of Winchcombe has not changed between 2019 and 2025 (at 8 units). In 2025, vacant units comprised 13.6% of all surveyed units in the centre which is similar to the national average. The proportion of vacant floorspace is slightly below the national average.

[49] Planning application reference 23/00990/FUL

4.87 The convenience goods shopping market share information in Table 4 at Appendix C indicates that foodstores in Winchcombe are able to retain 14.8% of all locally generated convenience goods expenditure generated by Zone 3b residents (the zone in which Winchcombe lies). Table 4 also indicates that convenience goods stores in Winchcombe have a very limited catchment beyond Zone 3b, will small market shares in Zones 1a, 1b, 2, 3a, 4, 7 and 8. Within mostof these zones Winchcombe's market share is circa 0.1%.

4.88 It is notable that the market share of online shopping for convenience goods amongst Zone 3b residents is 23.8%, which is by far the highest share of spending across the study area. By way of comparison, the convenience goods shoppingonline market shares in Cheltenham (Zones 1a-1d) are between 15%-20% whilst Gloucester is 12%-17%.

4.89 Based upon the market share information in Table 4, Table 5a calculates the study area derived turnover of convenience goods stores in Winchcombe. Overall, Table 5a forecasts a 2025 turnover for all stores of £6.2m, which is boosted by £2.2m of expenditure inflow to provide a total turnover of £8.4m.

4.90 Given the small size of the comparison goods retail offer in Winchcombe, it is unsurprising to see a small market share (of 3%) for existing stores amongst Zone 3b residents. This market share, along with a small amount of trade being drawn from Zones 1a, 1c, 2, 3a, 4, 6 and 7, translates into an overall study area derived comparison goods turnover for Winchcombe of £2.7m. This is boosted by £1.6m of expenditure inflow to provide a total turnover of £4.3m.

4.91 Tables 9a and 11a at Appendix C provide forecast levels of turnover for food and beverage facilities in Winchcombe. These comprise £6.8m for Class E(b) and £12.2m for sui generis food/beverage uses. It will be noted from the contents of both tables that the proportion of expenditure inflow to food/beverage facilities in the town is broadly equivalent to the level of study area derived turnover.

Other Parts of Tewkesbury Borough

4.92 Elsewhere in Tewkesbury Borough there is also a significant amount of other retail provision, a large proportion of which is located in Brockworth / Churchdown.

4.93 Brockworth is defined as a local centre in the Tewkesbury Local Plan, with the defined centre boundary containing a large Tesco Extra supermarket, David Lloyd leisure centre, Premier Inn hotel, public house / restaurant, and several smaller shop/service units (Greggs, Costa, Subway, Dominos, and Badhams pharmacy). Table 4 at Appendix C indicates that the Tesco store is the most popular store (by spending volume / market share) in Zone 5c of the study area, with a 17.5% market share. The store is also able to attract a market share of 4.2% in Zone 5d and 4% of spending in Zone 4. Based upon these market shares, along with a catchment area which also extends across other parts of the study area, Table 5a at Appendix C indicates that the Tesco in Brockworth has the highest study area derived and total turnover level of all foodstores/supermarkets in the SLP area.

4.94 During the course of preparing this Part 1 report, a planning application[50] for the construction of a new foodstore (to be occupied by Lidl), has been submitted to TBC. Whilst the Lidl application has not been accompanied by an assessment of the likely impact of the proposed foodstore, it is likely that a large majority of the turnover of the proposed store will be diverted from the adjacent Tesco supermarket along with the nearby ALDI foodstore in Hucclecote.

4.95 Another large foodstore in Tewkesbury Borough is the out of centre Tesco store in Churchdown, to the west of the A40. Table 4 at Appendix C indicates that the primary catchment for the Tesco store is Zone 5d of the study area, where the store is the third most popular destination (by spending volumes) behind the Tesco at St Oswalds and Sainsburys at

[50] 25/00634/FUL

Barnwood. Table 5a forecasts a study area derived turnover of £10.0m for the Tesco at Churchdown which rises to circa £10.7m when expenditure inflow is taken into account.

5. Summary and Conclusions

5.1 This Retail and Town Centres Study is being prepared by Nexus Planning for Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council. It is intended that this Study will provide up to date evidence base information for the SLP which is being prepared by the Councils as the main overarching planning strategy and cross-boundary strategic planning policies document for Gloucester, Cheltenham and Tewkesbury.

5.2 For the purposes of informing the preparation of the SLP, the overall Retail and Town Centre Study will be split into two distinct parts. This document forms Part 1 of the Study and includes:

a. A review of the background context to retail, commercial leisure and town centre land use issues, including recent trends and current commercial market sector characteristics which will influence how the SLP plans for retail land use provision and the main 'town centres' in Gloucester, Tewkesbury and Cheltenham.

b. A review of the main issues surrounding the health, role and function of the main 'town centres' in the SLP area, along with issues associated with the hierarchy of centres.

c. The provision of information regarding current spending patterns on retail and leisure uses across the SLP area.

5.3 Preparation for Part 2 of the Study commenced in Autumn 2025, and will provide: (a) assessments of the need for retail floorspace across the SLP area; (b) an assessment of the spatial aspects of retail floorspace provision, including the most appropriate locations to plan for provision of retail floorspace alongside the SLP 'town centres' strategy; and (c) advice on the content of retail and 'town centre' planning policies for the SLP and its wider strategic approach to 'town centre' planning policy and hierarchy issues.

Review of Economic Factors & Retail Trends

5.4 The background context and retail trends section of this Study has outlined a much more restrictive environment for retail spending growth. Whilst overall retail sales are expected to grow by circa 15% up to 2032, the amount of growth for bricks and mortar retailers is expected to be closer to 10%. When potential increases in floorspace efficiency and productivity are accounted for (as part of the need to allow existing floorspace the ability to benefit from growth in available spending), the increase in retail spending up to 2032 is forecast to be only 1.3%.

5.5 This study has also provided an analysis of changing forecasts for convenience (food) and comparison (non-food) retail spending in the medium to longer term. At the time of the 2021 Retail Study, comparison goods expenditure (excluding purely online sales) was expected to grow by 25% between 2020 and 2034. However, the latest forecasts suggest a growth of only 2.6% over the same period. A similar, but less pronounced picture, also exists for convenience goods expenditure, although it is to be noted that there is now expected to be a forecast decline in spending on convenience goods up to 2034.

5.6 A review has also been undertaken of online spending for the purposes of the baseline assessment in this report. At the national level, online spending has now found a 'new normal' following the passing of the Covid-19 pandemic. Whilst the scope for more rapid phases of growth in online retailing have now passed, it remains the case that both food and non-food spending online will continue to grow over the medium to longer term, with one quarter of all comparison goods spending to be directed towards purely online sales by 2034. At the local level, bespoke spending data gathered for the purposes of this Study has found levels in excess of this national figure.

5.7 The trends section of this document has also provided a summary of trends in retail store openings/closures across the UK, along with net store closures by location. In 2023 there was a net reduction of circa 5,000 retail stores in the UK, with a reduction continuing in 2024 with a further net loss of circa 3,800 stores. The rate of decline has been fastest in town centre locations, whilst the smallest increases have occurred in out of centre retail parks and stand-alone stores.

Key Headlines for the Main SLP 'Town Centres'

5.8 The review of the key retail characteristics of **Gloucester** city centre in this Study has confirmed many of the themes which were first established in the 2021 Retail Study. These include a higher than (national) average vacancy rate, which has now increased further over the past few years. At the present time, one in five retail and service units in the city centre are now vacant which should now be confirmed as a long-term characteristic that should be addressed through planning policy in the SLP. Since the previous (2021) retail study, the number of comparison goods retailers in the city centre has again fallen and there has also been a reduction in the number of service uses. The influencing factors behind these challenges for the city centre have been highlighted in previous evidence base studies and are based upon a combined of national trends as well as due to local circumstances.

5.9 In our opinion, a key influence on the performance of the historic part of the city centre is the scale of competition posed by other retail and leisure provision elsewhere in the city. Whilst there are reasons to suggest that the Gloucester Quays retail outlet centre (and associated leisure provision) has the potential to benefit the city centre through linked trips, the Quays nevertheless provides competition for shops and services along the four 'gate streets' in the city centre and the purpose-built shopping centres. Further significant competition comes from Eastern Avenue, St Oswald's Retail Park and Quedgeley district centre, along with the proximity of Cheltenham.

5.10 Rather than simply viewing the problems experienced by the city centre's retail sector as a negative issue for the city centre, the availability of surplus retail space should be seen as a clear opportunity for the future of strategic planning policy for the centre. The foundations for this strategy have already been laid with the development of The Forum area, which has provided a significant amount of office, hotel and other commercial space in a part of the city which was previous identified for retail-led mixed-use development. Similarly, the refurbishment of the former Debenhams department store building by the University of Gloucester is a superb example of a re-use of a large-scale retail unit. The new University building, which opened in August 2025, is likely to bring a large number of day-time visitors to the city centre, which can help support the health of the centre.

5.11 As noted above, the Quays/Docks area has occupied a unique position in the Gloucester retail market for a number of years. Whilst the retail outlet centre has been proven to bring new visitors to the city (including positive impacts of spin-off benefits), it is a likely that the outlet centre can also be viewed as an alternative mainstream comparison goods shopping destination to the city centre. It is also clear that the Quays/Docks area is now the pre-eminent location for food/beverage visits/spending in the city. The Quays has therefore had a major influence on the city centre but now faces its own challenges in relation to the new retail outlet centre in Ashchurch. It is unusual for an area such as the SLP area to have two retail outlet centres and there is the possibility that the Ashchurch facility, given its proximity to the M5, will pose significant competition to The Quays. This, therefore, requires careful consideration and should, in our opinion, be a key topic for the planning strategy/policy analysis in Part 2 of this Study.

5.12 The analysis within this Part 1 report has also been able to confirm a number of key and previously-acknowledged characteristics about **Cheltenham** town centre. First, the town centre remains a very popular and financially successful destination, with the highest turnover in the SLP area. The catchment area of the town centre for comparison goods shopping is wide, which is no doubt influenced by a wide range of non-food stores in the centre. Like Gloucester, Cheltenham town centre does face stiff competition from out of centre stores, although the evidence suggests that it is able to better withstand this aspect of competition. The food/beverage sectors in the town centre are also particularly strong, with a robust financial performance and an attractiveness which extends well beyond the study area. This is no doubt heavily influenced by the events held by Cheltenham throughout the year including those organised by Cheltenham Festivals and the horse racing festival.

5.13 One particular notable feature of the land use mix in the town centre is that the leisure services sector is now the largest sector, with around one third of all occupied units. This aspect of the hospitality sector is also boosted by the quality and (potentially expanding) quantity of hotel rooms in the town centre. This focus is aligned to the town's all year round attractiveness, which is regularly boosted by the annual events outlined above. Indeed, the demand for hotel space isgrowing with the potential for the Borough Council's municipal offices on the Promenade to be sold and converted to a large new hotel.

5.14 Outside of the town centre there have been a number of changes in retail provision since the completion of the 2021 Retail Study, although none have made a significant change to the overall retail landscape within the town. However, as already mentioned in relation to Gloucester, the opening of the retail outlet centre at Ashchurch has the potential to impact upon the financial performance of Cheltenham town centre, with a proportion of residents in the core of Cheltenham turning to the outlet centre for part of their comparison goods shopping requirements. This is a further reason why the initial impacts of the outlet centre should be monitored through the short to medium term.

5.15 A further potential change to the future amount and balance of retail and main town centre land use provision will be the level of new floorspace within the planned new local centres within the JCS strategic allocations. The key allocations in Cheltenham are North West Cheltenham (Elms Park) and West Cheltenham, both of which have been subject to outline planning applications (which have secured resolutions to grant permission from CBC). Both of these projects, combined, have the potential to add circa 16,000sq m (circa 172,000sq ft) of main town centre land use floorspace with very few controls over the future use of that floorspace[51].

5.16 The updated evidence base information for the **Tewkesbury and Ashchurch** area has shown that there has not been a significant change in the overall characteristics of Tewkesbury town centre. The town centre continues to have relatively modest market share levels for convenience and comparison goods shopping, across a reasonably limited catchment area. Unlike the other large town centres in the SLP area, Tewkesbury has not experienced a reduction in the proportion of comparison goods retailers in the centre over the past five years and only modest changes have occurred in the retail and service sectors. The one notable change is a fall in the vacancy rate in the town centre. The proportion of vacant property in the town centre was a cause for concern in the 2021 Retail Study, although the proportion is now well below the national average.

5.17 The wider Tewkesbury/Ashchurch is now starting to experience the impact of the planning permission for the large retail development to the east of the M5. Whilst phase 1 of the retail outlet centre at Ashchurch only opened for trade during the course of preparing this Part 1 Study report[52], the opening of the adjacent large garden centre has provided useful information regarding the split between local and non-local expenditure. It is clear from the latest spending data that the turnover of out of centre stores in Tewkesbury/Ashchurch are now gaining a large proportion of trade from outside of the study area used in this assessment. It is recommended that further spending data is gathered (to inform the SLP retail and 'town centres' evidence base) once the outlet centre has reached a settled trading pattern, in order to understand whether the trend associated with the garden centre is continuing with the retail outlet.

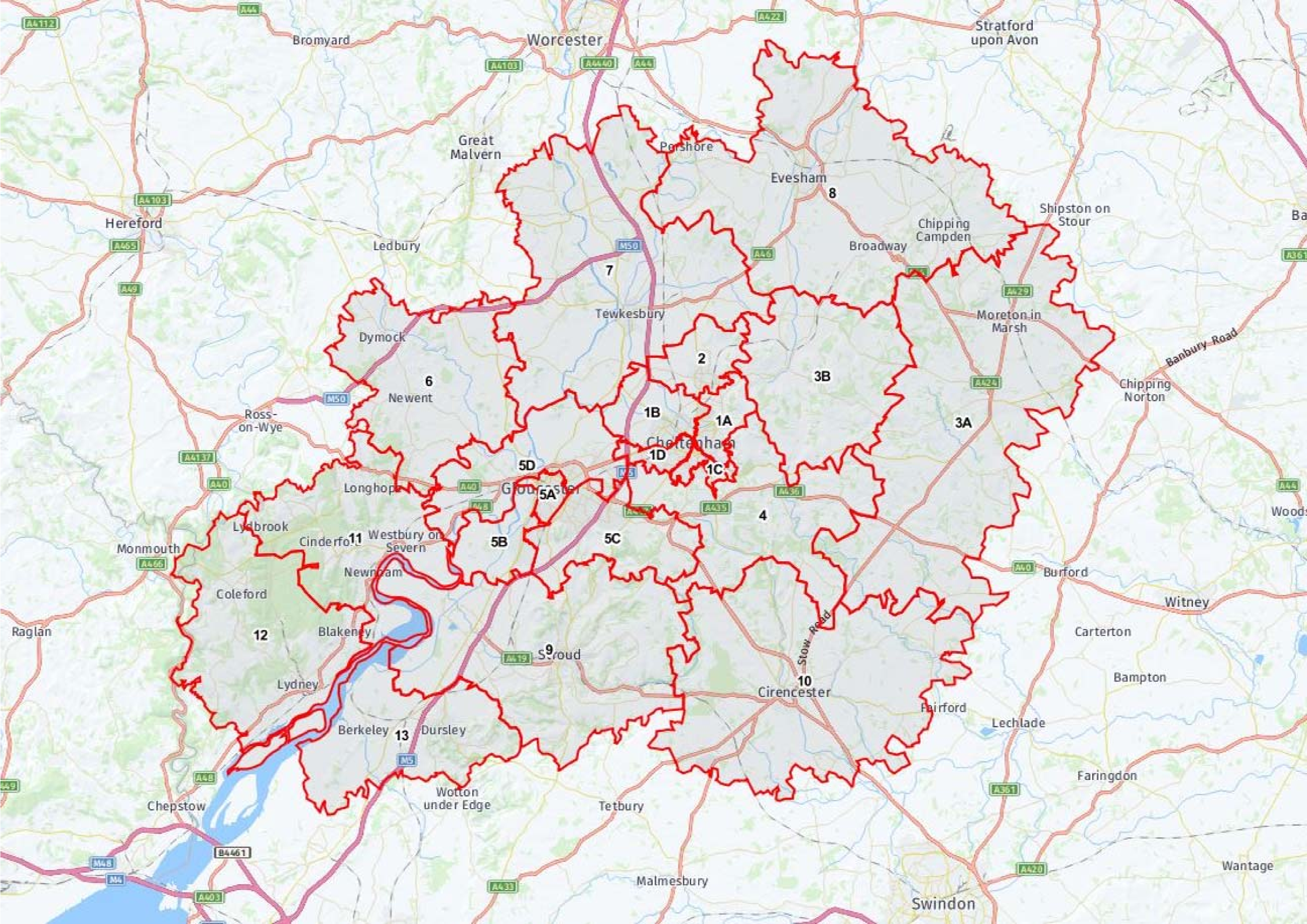
5.18 At the present time, the defined centre at **Bishops Cleeve** benefits from accommodating both of the large food stores in the village. TBC has recently resolved to grant planning permission for a new out of centre ALDI store which is likely to draw a large proportion of its turnover from the existing (in centre) Lidl and Tesco stores. In addition, the new ALDI store

[51] It should be noted that those strategic allocations in the JCS which include provision of a new local centre have not set any limit on the amount of main town centre land use floorspace which can potentially be provided.
[52] Phase 1 of the retail outlet opened in Summer 2025. A second phase of the outlet is planned, comprising circa 25 additional units.

will divert trips away from stores in Tewkesbury and Cheltenham (which currently attract convenience goods expenditure from residents of the Bishops Cleeve area).

5.19 The final defined 'town centre' covered by this review has been Winchcombe. The defined 'town centre' area in **Winchcombe** is relatively small and its land use composition has not changed significantly since the 2021 Retail Study. The grocery retail sector in the centre is orientated towards small scale top-up food shopping, which is able to attract a reasonable 15% market share of spending in the local area. Due to its location, online shopping for groceries amongst Winchcombe residents is the highest in the SLP area. Winchcombe also benefits from a comparatively high level of expenditure inflow from outside of the study area, no doubt reflecting its location in the study area and the attractiveness of the town to visitors (including its historic environment, range of specialist shops and attractions such as Sudeley Castle).

Appendix A: Study Area



Worcester
Bromyard
Stratford upon Avon
Great Malvern
Pershore
Evesham
8
Hereford
Ledbury
Shipston on Stour
Chipping Campden
Broadway
7
Tewkesbury
Moreton in Marsh
Banbury Road
Dymock
6
Newent
2
3B
Chipping Norton
Ross-on-Wye
1B
1A
3A
Cheltenham
1D
5D
1C
Longhope
Gloucester
5A
4
Lydbrook
Cinderford
11
Westbury on Severn
5B
5C
Monmouth
Newnham
Burford
Coleford
Witney
Raglan
12
Blakeney
Carterton
Stroud
9
Stow Road
Bampton
Lydney
10
Cirencester
Fairford
Berkeley
13
Dursley
Lechlade
Faringdon
Chepstow
Wotton under Edge
Tetbury
Malmesbury
Wantage
Swindon

Appendix B: Land Use Data

GLOUCESTER - CITY CENTRE LAND USE PROFILE, 2019-2025

	2019				2024				2025				Change, 2019 to 2025	
	Units		Floorspace (sq ft)		Units		Floorspace (sq ft)		Units		Floorspace (sq ft)			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	Units	Floorspace (sq ft)
CONVENIENCE	**34**	**6.7%**	**199800**	**13.4%**	**36**	**7.2%**	**197300**	**13.5%**	**35**	**7.1%**	**195200**	**13.3%**	**1**	**-4600**
Bakers & Confectioners	6	1.2%	6500	0.4%	6	1.2%	8100	0.6%	6	1.2%	8100	0.6%	0	1600
Butchers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
CTN	7	1.4%	9100	0.6%	9	1.8%	20700	1.4%	8	1.6%	19700	1.3%	1	10600
Convenience Stores	5	1.0%	10900	0.7%	10	2.0%	22900	1.6%	11	2.2%	24100	1.6%	6	13200
Fishmongers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Frozen Foods	1	0.2%	8700	0.6%	1	0.2%	8700	0.6%	1	0.2%	8700	0.6%	0	0
Greengrocers	2	0.4%	1700	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-2	-1700
Grocers & Delicatessens	4	0.8%	6500	0.4%	3	0.6%	4600	0.3%	2	0.4%	2300	0.2%	-2	-4200
Health Foods	2	0.4%	2000	0.1%	2	0.4%	2000	0.1%	2	0.4%	2000	0.1%	0	0
Markets	1	0.2%	18900	1.3%	1	0.2%	18900	1.3%	1	0.2%	18900	1.3%	0	0
Off Licences	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Shoe Repairs Etc	3	0.6%	1400	0.1%	3	0.6%	2300	0.2%	3	0.6%	2300	0.2%	0	900
Supermarkets	3	0.6%	134100	9.0%	1	0.2%	109100	7.5%	1	0.2%	109100	7.4%	-2	-25000
COMPARISON	**145**	**28.6%**	**490300**	**32.9%**	**130**	**26.2%**	**406300**	**27.9%**	**133**	**26.9%**	**468550**	**31.9%**	**-12**	**-21750**
Antique Shops	2	0.4%	6400	0.4%	2	0.4%	2700	0.2%	2	0.4%	2700	0.2%	0	-3700
Art & Art Dealers	2	0.4%	1600	0.1%	2	0.4%	1400	0.1%	2	0.4%	1400	0.1%	0	-200
Booksellers	4	0.8%	10800	0.7%	3	0.6%	9500	0.7%	3	0.6%	9500	0.6%	-1	-1300
Carpets & Flooring	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Catalogue Showrooms	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Charity Shops	15	3.0%	33600	2.3%	14	2.8%	32900	2.3%	14	2.8%	33500	2.3%	-1	-100
Chemist & Drugstores	2	0.4%	12100	0.8%	1	0.2%	10600	0.7%	1	0.2%	10600	0.7%	-1	-1500
Childrens & Infants Wear	1	0.2%	4800	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1	-4800
Clothing General	7	1.4%	85100	5.7%	8	1.6%	101700	7.0%	8	1.6%	101700	6.9%	1	16600
Crafts, Gifts, China & Glass	9	1.8%	7300	0.5%	10	2.0%	8200	0.6%	10	2.0%	8200	0.6%	1	900
Cycles & Accessories	1	0.2%	2600	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1	-2600
Department & Variety Stores	3	0.6%	92400	6.2%	1	0.2%	22400	1.5%	2	0.4%	80000	5.4%	-1	-12400
DIY & Home Improvement	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Electrical & Other Durable Goods	3	0.6%	4400	0.3%	2	0.4%	2000	0.1%	2	0.4%	2000	0.1%	-1	-2400
Florists	1	0.2%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1	-100
Footwear	5	1.0%	6600	0.4%	4	0.8%	13300	0.9%	4	0.8%	13300	0.9%	-1	6700
Furniture Fitted	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Furniture General	5	1.0%	31600	2.1%	5	1.0%	37900	2.6%	5	1.0%	37900	2.6%	0	6300
Gardens & Equipment	0	0.0%	0	0.0%	1	0.2%	1100	0.1%	1	0.2%	1100	0.1%	1	1100
Greeting Cards	6	1.2%	11100	0.7%	3	0.6%	5700	0.4%	3	0.6%	5700	0.4%	-3	-5400
Hardware & Household Goods	4	0.8%	31200	2.1%	5	1.0%	32100	2.2%	5	1.0%	32100	2.2%	1	900
Jewellery, Watches & Silver	11	2.2%	9100	0.6%	10	2.0%	10000	0.7%	9	1.8%	9000	0.6%	-2	-100
Ladies & Mens Wear & Acc.	3	0.6%	4600	0.3%	4	0.8%	7500	0.5%	5	1.0%	10300	0.7%	2	5700
Ladies Wear & Accessories	11	2.2%	24300	1.6%	8	1.6%	12700	0.9%	9	1.8%	14000	1.0%	-2	-10300
Leather & Travel Goods	1	0.2%	800	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1	-800
Mens Wear & Accessories	7	1.4%	15600	1.0%	2	0.4%	4600	0.3%	1	0.2%	4000	0.3%	-6	-11600
Music & Musical Instruments	1	0.2%	1100	0.1%	0	0.0%	0	0.0%	1	0.2%	1000	0.1%	0	-100
Music & Video Recordings	0	0.0%	0	0.0%	1	0.2%	700	0.0%	1	0.2%	700	0.0%	1	700
Newsagents & Stationers	1	0.2%	6800	0.5%	1	0.2%	6800	0.5%	1	0.2%	6800	0.5%	0	0
Office Supplies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Other Comparison Goods	7	1.4%	12500	0.8%	6	1.2%	10100	0.7%	5	1.0%	7850	0.5%	-2	-4650
Photographic & Optical	2	0.4%	3600	0.2%	1	0.2%	1300	0.1%	1	0.2%	1300	0.1%	-1	-2300
Secondhand Goods, Books, etc.	0	0.0%	0	0.0%	1	0.2%	1000	0.1%	1	0.2%	1000	0.1%	1	1000
Sports, Camping & Leisure Goods	5	1.0%	20800	1.4%	6	1.2%	20100	1.4%	6	1.2%	20100	1.4%	1	-700
Telephones & Accessories	11	2.2%	14600	1.0%	14	2.8%	15500	1.1%	16	3.2%	18300	1.2%	5	3700
Textiles & Soft Furnishings	3	0.6%	5400	0.4%	1	0.2%	600	0.0%	1	0.2%	600	0.0%	-2	-4800
Toiletries, Cosmetics & Beauty Products	6	1.2%	13300	0.9%	8	1.6%	16800	1.2%	8	1.6%	16800	1.1%	2	3500
Toys, Games & Hobbies	6	1.2%	16100	1.1%	6	1.2%	17100	1.2%	6	1.2%	17100	1.2%	0	1000
Vehicle & Motorcycle Sales	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Vehicle Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
RETAIL SERVICE	**82**	**16.2%**	**111600**	**7.5%**	**80**	**16.1%**	**102400**	**7.0%**	**80**	**16.2%**	**105500**	**7.2%**	**-2**	**-6100**
Clothing & Fancy Dress Hire	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Dry Cleaners & Launderettes	3	0.6%	3500	0.2%	3	0.6%	3100	0.2%	3	0.6%	3100	0.2%	0	-400
Filling Stations	1	0.2%	3200	0.2%	1	0.2%	3200	0.2%	1	0.2%	3200	0.2%	0	0
Health & Beauty	62	12.2%	71500	4.8%	65	13.1%	70100	4.8%	63	12.7%	69200	4.7%	1	-2300
Opticians	5	1.0%	10100	0.7%	4	0.8%	8500	0.6%	4	0.8%	8500	0.6%	-1	-1600
Other Retail Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Photo Processing	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Photo Studio	0	0.0%	0	0.0%	1	0.2%	600	0.0%	1	0.2%	600	0.0%	1	600
Post Offices	1	0.2%	7200	0.5%	1	0.2%	7200	0.5%	1	0.2%	7200	0.5%	0	0
Repairs, Alterations & Restoration	1	0.2%	500	0.0%	1	0.2%	1800	0.1%	1	0.2%	1800	0.1%	0	1300
Travel Agents	5	1.0%	7300	0.5%	3	0.6%	4400	0.3%	4	0.8%	4700	0.3%	-1	-2600
TV, Cable & Video Rental	2	0.4%	1100	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-2	-1100
Vehicle Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Vehicle Repairs & Services	2	0.4%	7200	0.5%	1	0.2%	3500	0.2%	2	0.4%	7200	0.5%	0	0
Video Tape Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
LEISURE SERVICES	**108**	**21.3%**	**351400**	**23.6%**	**106**	**21.3%**	**356200**	**24.4%**	**107**	**21.6%**	**358250**	**24.4%**	**-1**	**6850**
Bars & Wine Bars	3	0.6%	15500	1.0%	3	0.6%	9300	0.6%	4	0.8%	14300	1.0%	1	-1200
Bingo & Amusements	4	0.8%	18700	1.3%	2	0.4%	2900	0.2%	3	0.6%	3650	0.2%	-1	-15050
Cafes	24	4.7%	33300	2.2%	28	5.6%	59300	4.1%	26	5.3%	48200	3.3%	2	14900
Casinos & Betting Offices	7	1.4%	14100	0.9%	5	1.0%	10300	0.7%	5	1.0%	10300	0.7%	-2	-3800
Cinemas, Theatres & Concert Halls	1	0.2%	3000	0.2%	1	0.2%	3000	0.2%	1	0.2%	3000	0.2%	0	0
Clubs	3	0.6%	14200	1.0%	2	0.4%	12600	0.9%	2	0.4%	12600	0.9%	-1	-1600
Disco, Dance & Nightclubs	5	1.0%	31600	2.1%	6	1.2%	29700	2.0%	6	1.2%	29700	2.0%	1	-1900
Fast Food & Take Away	26	5.1%	31000	2.1%	24	4.8%	32100	2.2%	24	4.8%	31800	2.2%	-2	800
Hotels & Guest Houses	2	0.4%	5800	0.4%	4	0.8%	21700	1.5%	4	0.8%	28600	1.9%	2	22800
Public Houses	17	3.4%	71900	4.8%	12	2.4%	46200	3.2%	12	2.4%	46200	3.1%	-5	-25700
Restaurants	11	2.2%	15100	1.0%	13	2.6%	20800	1.4%	14	2.8%	24900	1.7%	3	9800
Sports & Leisure Facilities	5	1.0%	97200	6.5%	6	1.2%	108300	7.4%	6	1.2%	105000	7.1%	1	7800
FINANCIAL & BUSINESS SERVICES	**43**	**8.5%**	**118700**	**8.0%**	**39**	**7.8%**	**103400**	**7.1%**	**39**	**7.9%**	**104300**	**7.1%**	**-4**	**-14400**
Building Societies	3	0.6%	7100	0.5%	3	0.6%	4400	0.3%	3	0.6%	5100	0.3%	0	-2000
Building Supplies & Services	2	0.4%	5800	0.4%	2	0.4%	5800	0.4%	2	0.4%	5800	0.4%	0	0
Business Goods & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Employment & Careers	7	1.4%	13800	0.9%	4	0.8%	5000	0.3%	4	0.8%	5000	0.3%	-3	-8800
Financial Services	3	0.6%	6200	0.4%	6	1.2%	9600	0.7%	7	1.4%	11000	0.7%	4	4800
Legal Services	4	0.8%	13600	0.9%	3	0.6%	12300	0.8%	3	0.6%	12300	0.8%	-1	-1300
Other Business Services	0	0.0%	0	0.0%	2	0.4%	1300	0.1%	2	0.4%	1300	0.1%	2	1300
Printing & Copying	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Property Services	12	2.4%	22500	1.5%	10	2.0%	19600	1.3%	9	1.8%	18400	1.3%	-3	-4100
Retail Banks	12	2.4%	49700	3.3%	9	1.8%	45400	3.1%	9	1.8%	45400	3.1%	-3	-4300
VACANT	**95**	**18.7%**	**217900**	**14.6%**	**106**	**21.3%**	**292000**	**20.0%**	**101**	**20.4%**	**238600**	**16.2%**	**6**	**20700**
TOTAL	**507**	**100%**	**1489700**	**100%**	**497**	**100%**	**1457600**	**100%**	**495**	**100%**	**1470400**	**100%**		

Notes: Experian GOAD data for 2019 and 2024, updated to 2025 by Nexus.

CHELTENHAM - TOWN CENTRE LAND USE PROFILE, 2019-2025

	2019				2024				2025				Change, 2019 to 2025	
	Units		Floorspace		Units		Floorspace		Units		Floorspace			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	Units	Floorspace
CONVENIENCE	**42**	6.1%	**82800**	4.8%	**40**	5.9%	**67600**	4.0%	**42**	6.1%	**71071**	4.2%	**0.00**	**-11729.00**
Bakers & Confectioners	9	1.3%	7900	0.5%	8	1.2%	7400	0.4%	10	1.5%	9880	0.6%	1.00	1980.00
Butchers	0	0.0%	0	0.0%	1	0.1%	600	0.0%	1	0.1%	600	0.0%	1.00	600.00
CTN	7	1.0%	4200	0.2%	5	0.7%	3300	0.2%	6	0.9%	5190	0.3%	-1.00	990.00
Convenience Stores	5	0.7%	12500	0.7%	9	1.3%	27000	1.6%	9	1.3%	26651	1.6%	4.00	14151.00
Fishmongers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Frozen Foods	1	0.1%	6800	0.4%	1	0.1%	6800	0.4%	1	0.1%	6800	0.4%	0.00	0.00
Greengrocers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Grocers & Delicatessens	6	0.9%	9200	0.5%	6	0.9%	12700	0.7%	6	0.9%	12700	0.7%	0.00	3500.00
Health Foods	4	0.6%	4000	0.2%	3	0.4%	3000	0.2%	3	0.4%	3000	0.2%	-1.00	-1000.00
Markets	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Off Licences	3	0.4%	2700	0.2%	3	0.4%	2700	0.2%	2	0.3%	2150	0.1%	-1.00	-550.00
Shoe Repairs Etc	4	0.6%	1900	0.1%	3	0.4%	1000	0.1%	3	0.4%	1000	0.1%	-1.00	-900.00
Supermarkets	3	0.4%	33600	1.9%	1	0.1%	3100	0.2%	1	0.1%	3100	0.2%	-2.00	-30500.00
COMPARISON	**217**	31.6%	**738200**	42.7%	**187**	27.4%	**572900**	33.5%	**192**	28.1%	**580487**	33.9%	**-25.00**	**-157713.00**
Antique Shops	1	0.1%	400	0.0%	2	0.3%	1100	0.1%	3	0.4%	1667	0.1%	2.00	1267.00
Art & Art Dealers	3	0.4%	5000	0.3%	2	0.3%	3900	0.2%	2	0.3%	3900	0.2%	-1.00	-1100.00
Booksellers	6	0.9%	11400	0.7%	4	0.6%	14400	0.8%	4	0.6%	14400	0.8%	-2.00	3000.00
Carpets & Flooring	3	0.4%	6500	0.4%	3	0.4%	6500	0.4%	3	0.4%	6500	0.4%	0.00	0.00
Catalogue Showrooms	1	0.1%	5600	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-5600.00
Charity Shops	12	1.7%	17000	1.0%	10	1.5%	14100	0.8%	13	1.9%	17082	1.0%	1.00	82.00
Chemist & Drugstores	3	0.4%	15700	0.9%	3	0.4%	15700	0.9%	3	0.4%	15700	0.9%	0.00	0.00
Childrens & Infants Wear	3	0.4%	2700	0.2%	2	0.3%	1200	0.1%	2	0.3%	1200	0.1%	-1.00	-1500.00
Clothing General	13	1.9%	88900	5.1%	15	2.2%	89900	5.3%	14	2.0%	88690	5.2%	1.00	-210.00
Crafts, Gifts, China & Glass	6	0.9%	11200	0.6%	3	0.4%	6600	0.4%	5	0.7%	10260	0.6%	-1.00	-940.00
Cycles & Accessories	4	0.6%	14900	0.9%	3	0.4%	10100	0.6%	3	0.4%	10100	0.6%	-1.00	-4800.00
Department & Variety Stores	5	0.7%	263300	15.2%	3	0.4%	129800	7.6%	3	0.4%	129800	7.6%	-2.00	-133500.00
DIY & Home Improvement	1	0.1%	600	0.0%	1	0.1%	700	0.0%	1	0.1%	700	0.0%	0.00	100.00
Electrical & Other Durable Goods	12	1.7%	12200	0.7%	9	1.3%	8400	0.5%	9	1.3%	8400	0.5%	-3.00	-3800.00
Florists	1	0.1%	1200	0.1%	1	0.1%	1200	0.1%	1	0.1%	1200	0.1%	0.00	0.00
Footwear	10	1.5%	17600	1.0%	8	1.2%	19500	1.1%	8	1.2%	19500	1.1%	-2.00	1900.00
Furniture Fitted	3	0.4%	5100	0.3%	5	0.7%	10300	0.6%	6	0.9%	11730	0.7%	3.00	6630.00
Furniture General	5	0.7%	17600	1.0%	5	0.7%	19300	1.1%	4	0.6%	18250	1.1%	-1.00	650.00
Gardens & Equipment	0	0.0%	0	0.0%	1	0.1%	7400	0.4%	0	0.0%	0	0.0%	0.00	0.00
Greeting Cards	4	0.6%	8000	0.5%	3	0.4%	6200	0.4%	2	0.3%	5480	0.3%	-2.00	-2520.00
Hardware & Household Goods	3	0.4%	14100	0.8%	3	0.4%	14100	0.8%	4	0.6%	15310	0.9%	1.00	1210.00
Jewellery, Watches & Silver	20	2.9%	16200	0.9%	18	2.6%	13600	0.8%	16	2.3%	11421	0.7%	-4.00	-4779.00
Ladies & Mens Wear & Acc.	15	2.2%	69100	4.0%	10	1.5%	43500	2.5%	11	1.6%	44933	2.6%	-4.00	-24167.00
Ladies Wear & Accessories	25	3.6%	46200	2.7%	17	2.5%	30600	1.8%	19	2.8%	32047	1.9%	-6.00	-14153.00
Leather & Travel Goods	1	0.1%	1600	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-1600.00
Mens Wear & Accessories	6	0.9%	12800	0.7%	6	0.9%	10100	0.6%	7	1.0%	13520	0.8%	1.00	720.00
Music & Musical Instruments	1	0.1%	600	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-600.00
Music & Video Recordings	2	0.3%	4000	0.2%	2	0.3%	4000	0.2%	1	0.1%	740	0.0%	-1.00	-3260.00
Newsagents & Stationers	3	0.4%	8200	0.5%	2	0.3%	6500	0.4%	2	0.3%	6500	0.4%	-1.00	-1700.00
Office Supplies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Other Comparison Goods	6	0.9%	8800	0.5%	6	0.9%	7700	0.5%	6	0.9%	7700	0.5%	0.00	-1100.00
Photographic & Optical	1	0.1%	500	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-500.00
Secondhand Goods, Books, etc.	2	0.3%	1200	0.1%	4	0.6%	2900	0.2%	2	0.3%	1877	0.1%	0.00	677.00
Sports, Camping & Leisure Goods	2	0.3%	1500	0.1%	4	0.6%	23800	1.4%	4	0.6%	23800	1.4%	2.00	22300.00
Telephones & Accessories	13	1.9%	14400	0.8%	13	1.9%	14300	0.8%	14	2.0%	15720	0.9%	1.00	1320.00
Textiles & Soft Furnishings	5	0.7%	6700	0.4%	5	0.7%	10700	0.6%	5	0.7%	10700	0.6%	0.00	4000.00
Toiletries, Cosmetics & Beauty Products	9	1.3%	15700	0.9%	9	1.3%	16600	1.0%	9	1.3%	16600	1.0%	0.00	900.00
Toys, Games & Hobbies	7	1.0%	11700	0.7%	5	0.7%	8200	0.5%	6	0.9%	15060	0.9%	-1.00	3360.00
Vehicle & Motorcycle Sales	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
RETAIL SERVICE	**105**	15.3%	**109400**	6.3%	**102**	14.9%	**100800**	5.9%	**111**	16.3%	**107747**	6.3%	**6.00**	**-1653.00**
Clothing & Fancy Dress Hire	1	0.1%	1000	0.1%	1	0.1%	1000	0.1%	0	0.0%	0	0.0%	-1.00	-1000.00
Dry Cleaners & Launderettes	5	0.7%	5600	0.3%	5	0.7%	5600	0.3%	5	0.7%	5600	0.3%	0.00	0.00
Filling Stations	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Health & Beauty	68	9.9%	63000	3.6%	67	9.8%	57400	3.4%	78	11.4%	65347	3.8%	10.00	2347.00
Opticians	11	1.6%	15800	0.9%	12	1.8%	16800	1.0%	12	1.8%	17400	1.0%	1.00	1600.00
Other Retail Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Photo Processing	1	0.1%	800	0.0%	1	0.1%	800	0.0%	1	0.1%	800	0.0%	0.00	0.00
Photo Studio	1	0.1%	700	0.0%	2	0.3%	900	0.1%	2	0.3%	900	0.1%	1.00	200.00
Post Offices	1	0.1%	900	0.1%	1	0.1%	900	0.1%	1	0.1%	900	0.1%	0.00	0.00
Repairs, Alterations & Restoration	3	0.4%	3600	0.2%	3	0.4%	2800	0.2%	3	0.4%	2800	0.2%	0.00	-800.00
Travel Agents	9	1.3%	11100	0.6%	5	0.7%	7700	0.5%	5	0.7%	7700	0.5%	-4.00	-3400.00
TV, Cable & Video Rental	1	0.1%	100	0.0%	1	0.1%	100	0.0%	1	0.1%	100	0.0%	0.00	0.00
Vehicle Rental	1	0.1%	600	0.0%	1	0.1%	600	0.0%	0	0.0%	0	0.0%	-1.00	-600.00
Vehicle Repairs & Services	3	0.4%	6200	0.4%	3	0.4%	6200	0.4%	3	0.4%	6200	0.4%	0.00	0.00
Video Tape Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
LEISURE SERVICES	**194**	28.3%	**521900**	30.2%	**211**	30.9%	**564800**	33.0%	**218**	31.9%	**573336**	33.5%	**24.00**	**51436.00**
Bars & Wine Bars	33	4.8%	72300	4.2%	25	3.7%	57800	3.4%	25	3.7%	57476	3.4%	-8.00	-14824.00
Bingo & Amusements	2	0.3%	3700	0.2%	5	0.7%	20800	1.2%	5	0.7%	20800	1.2%	3.00	17100.00
Cafes	34	5.0%	42500	2.5%	41	6.0%	56600	3.3%	41	6.0%	53410	3.1%	7.00	10910.00
Casinos & Betting Offices	6	0.9%	9800	0.6%	6	0.9%	9300	0.5%	7	1.0%	11230	0.7%	1.00	1430.00
Cinemas, Theatres & Concert Halls	4	0.6%	62900	3.6%	5	0.7%	65700	3.8%	5	0.7%	65700	3.8%	1.00	2800.00
Clubs	6	0.9%	17600	1.0%	6	0.9%	14500	0.8%	6	0.9%	14500	0.8%	0.00	-3100.00
Disco, Dance & Nightclubs	1	0.1%	4300	0.2%	2	0.3%	6300	0.4%	2	0.3%	6300	0.4%	1.00	2000.00
Fast Food & Take Away	34	5.0%	48200	2.8%	39	5.7%	60500	3.5%	41	6.0%	62310	3.6%	7.00	14110.00
Hotels & Guest Houses	4	0.6%	18800	1.1%	5	0.7%	20300	1.2%	5	0.7%	20300	1.2%	1.00	1500.00
Public Houses	17	2.5%	76500	4.4%	20	2.9%	85400	5.0%	21	3.1%	90430	5.3%	4.00	13930.00
Restaurants	41	6.0%	91000	5.3%	43	6.3%	91600	5.4%	46	6.7%	94880	5.5%	5.00	3880.00
Sports & Leisure Facilities	12	1.7%	74300	4.3%	14	2.0%	76000	4.4%	14	2.0%	76000	4.4%	2.00	1700.00
		0.0%		0.0%		0.0%		0.0%		0.0%		0.0%		
FINANCIAL & BUSINESS SERVICES	**60**	8.7%	**113700**	6.6%	**49**	7.2%	**127500**	7.5%	**48**	7.0%	**126350**	7.4%	**-12.00**	**12650.00**
Building Societies	4	0.6%	6400	0.4%	4	0.6%	6400	0.4%	4	0.6%	6400	0.4%	0.00	0.00
Building Supplies & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Business Goods & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Employment & Careers	6	0.9%	4800	0.3%	4	0.6%	2900	0.2%	4	0.6%	2900	0.2%	-2.00	-1900.00
Financial Services	3	0.4%	4400	0.3%	3	0.4%	4000	0.2%	3	0.4%	4000	0.2%	0.00	-400.00
Legal Services	7	1.0%	13300	0.8%	5	0.7%	20100	1.2%	5	0.7%	20100	1.2%	-2.00	6800.00
Other Business Services	3	0.4%	4200	0.2%	3	0.4%	27300	1.6%	3	0.4%	27300	1.6%	0.00	23100.00
Printing & Copying	2	0.3%	1000	0.1%	2	0.3%	1000	0.1%	2	0.3%	1000	0.1%	0.00	0.00
Property Services	25	3.6%	37200	2.2%	20	2.9%	28800	1.7%	19	2.8%	27650	1.6%	-6.00	-9550.00
Retail Banks	10	1.5%	42400	2.5%	8	1.2%	37000	2.2%	8	1.2%	37000	2.2%	-2.00	-5400.00
VACANT	**68**	9.9%	**161800**	9.4%	**94**	13.8%	**275600**	16.1%	**72**	10.5%	**251299**	14.7%	4.00	89499.00
TOTAL	**686**	**100.0%**	**1727800**	**100.0%**	**683**	**100.0%**	**1709200**	**100.0%**	**683**	**100.0%**	**1710290**	**100.0%**		

Notes: Experian GOAD data for 2019 and 2024, updated to 2025 by Nexus.

TEWKESBURY - TOWN CENTRE LAND USE PROFILE, 2018-2025

	2018				2024				2025				Change, 2018 to 2025	
	Units		Floorspace		Units		Floorspace		Units		Floorspace			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	Units	Floorspace
CONVENIENCE	**18**	**8.1%**	**39300**	**10.6%**	**16**	**7.6%**	**37300**	**11.0%**	**16**	**7.6%**	**37300**	**11.1%**	**-2.00**	**-2000.00**
Bakers & Confectioners	7	3.1%	9900	2.7%	7	3.3%	9900	2.9%	7	3.3%	9900	2.9%	0.00	0.00
Butchers	2	0.9%	6000	1.6%	2	0.9%	6000	1.8%	2	1.0%	6000	1.8%	0.00	0.00
CTN	3	1.3%	3600	1.0%	1	0.5%	1600	0.5%	1	0.5%	1600	0.5%	-2.00	-2000.00
Convenience Stores	1	0.4%	4100	1.1%	2	0.9%	14600	4.3%	2	1.0%	14600	4.3%	1.00	10500.00
Fishmongers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Frozen Foods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Greengrocers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Grocers & Delicatessens	2	0.9%	3400	0.9%	2	0.9%	3400	1.0%	2	1.0%	3400	1.0%	0.00	0.00
Health Foods	1	0.4%	1100	0.3%	1	0.5%	1100	0.3%	1	0.5%	1100	0.3%	0.00	0.00
Markets	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Off Licences	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Shoe Repairs Etc	1	0.4%	700	0.2%	1	0.5%	700	0.2%	1	0.5%	700	0.2%	0.00	0.00
Supermarkets	1	0.4%	10500	2.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-10500.00
COMPARISON	**61**	**27.4%**	**117600**	**31.7%**	**61**	**28.9%**	**110400**	**32.7%**	**64**	**30.5%**	**117890**	**35.0%**	**3.00**	**290.00**
Antique Shops	3	1.3%	5300	1.4%	1	0.5%	2900	0.9%	1	0.5%	2900	0.9%	-2.00	-2400.00
Art & Art Dealers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3	1.4%	4300	1.3%	3.00	4300.00
Booksellers	3	1.3%	5700	1.5%	2	0.9%	2900	0.9%	2	1.0%	2900	0.9%	-1.00	-2800.00
Carpets & Flooring	2	0.9%	6200	1.7%	2	0.9%	6200	1.8%	2	1.0%	6200	1.8%	0.00	0.00
Catalogue Showrooms	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Charity Shops	9	4.0%	11800	3.2%	11	5.2%	13800	4.1%	12	5.7%	17930	5.3%	3.00	6130.00
Chemist & Drugstores	2	0.9%	6500	1.8%	1	0.5%	5500	1.6%	1	0.5%	5500	1.6%	-1.00	-1000.00
Childrens & Infants Wear	1	0.4%	500	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-500.00
Clothing General	6	2.7%	15700	4.2%	5	2.4%	15700	4.6%	5	2.4%	15700	4.7%	-1.00	0.00
Crafts, Gifts, China & Glass	2	0.9%	2300	0.6%	4	1.9%	4300	1.3%	4	1.9%	4300	1.3%	2.00	2000.00
Cycles & Accessories	1	0.4%	2400	0.6%	1	0.5%	2400	0.7%	1	0.5%	2400	0.7%	0.00	0.00
Department & Variety Stores	1	0.4%	3600	1.0%	1	0.5%	3600	1.1%	1	0.5%	3600	1.1%	0.00	0.00
DIY & Home Improvement	1	0.4%	2500	0.7%	1	0.5%	2500	0.7%	1	0.5%	2500	0.7%	0.00	0.00
Electrical & Other Durable Goods	1	0.4%	2300	0.6%	1	0.5%	2300	0.7%	1	0.5%	2300	0.7%	0.00	0.00
Florists	1	0.4%	1500	0.4%	1	0.5%	1500	0.4%	1	0.5%	1500	0.4%	0.00	0.00
Footwear	1	0.4%	2300	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-2300.00
Furniture Fitted	1	0.4%	800	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-800.00
Furniture General	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Gardens & Equipment	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Greeting Cards	4	1.8%	7100	1.9%	4	1.9%	7100	2.1%	4	1.9%	7100	2.1%	0.00	0.00
Hardware & Household Goods	3	1.3%	11600	3.1%	2	0.9%	9700	2.9%	2	1.0%	9700	2.9%	-1.00	-1900.00
Jewellery, Watches & Silver	3	1.3%	2500	0.7%	3	1.4%	2500	0.7%	3	1.4%	2500	0.7%	0.00	0.00
Ladies & Mens Wear & Acc.	1	0.4%	600	0.2%	3	1.4%	3800	1.1%	3	1.4%	3800	1.1%	2.00	3200.00
Ladies Wear & Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Leather & Travel Goods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Mens Wear & Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Music & Musical Instruments	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Music & Video Recordings	0	0.0%	0	0.0%	1	0.5%	600	0.2%	1	0.5%	600	0.2%	1.00	600.00
Newsagents & Stationers	1	0.4%	2800	0.8%	1	0.5%	2800	0.8%	1	0.5%	2800	0.8%	0.00	0.00
Office Supplies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Other Comparison Goods	3	1.3%	1800	0.5%	4	1.9%	2700	0.8%	3	1.4%	1760	0.5%	0.00	-40.00
Photographic & Optical	1	0.4%	1000	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-1000.00
Secondhand Goods, Books, etc.	3	1.3%	2900	0.8%	4	1.9%	6100	1.8%	4	1.9%	6100	1.8%	1.00	3200.00
Sports, Camping & Leisure Goods	1	0.4%	800	0.2%	1	0.5%	800	0.2%	1	0.5%	800	0.2%	0.00	0.00
Telephones & Accessories	3	1.3%	4000	1.1%	4	1.9%	4900	1.5%	4	1.9%	4900	1.5%	1.00	900.00
Textiles & Soft Furnishings	0	0.0%	0	0.0%	1	0.5%	800	0.2%	1	0.5%	800	0.2%	1.00	800.00
Toiletries, Cosmetics & Beauty Products	2	0.9%	7300	2.0%	2	0.9%	5000	1.5%	2	1.0%	5000	1.5%	0.00	-2300.00
Toys, Games & Hobbies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle & Motorcycle Sales	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Accessories	1	0.4%	5800	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-5800.00
RETAIL SERVICE	**34**	**15.2%**	**35100**	**9.5%**	**31**	**14.7%**	**35700**	**10.6%**	**35**	**16.7%**	**38475**	**11.4%**	**1.00**	**3375.00**
Clothing & Fancy Dress Hire	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Dry Cleaners & Launderettes	1	0.4%	1300	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-1300.00
Filling Stations	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Health & Beauty	20	9.0%	18200	4.9%	19	9.0%	20400	6.0%	22	10.5%	22335	6.6%	2.00	4135.00
Opticians	5	2.2%	5500	1.5%	5	2.4%	5500	1.6%	5	2.4%	5500	1.6%	0.00	0.00
Other Retail Services	3	1.3%	5400	1.5%	3	1.4%	5400	1.6%	4	1.9%	6240	1.9%	1.00	840.00
Photo Processing	1	0.4%	900	0.2%	1	0.5%	900	0.3%	1	0.5%	900	0.3%	0.00	0.00
Photo Studio	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Post Offices	1	0.4%	1000	0.3%	1	0.5%	1000	0.3%	1	0.5%	1000	0.3%	0.00	0.00
Repairs, Alterations & Restoration	1	0.4%	800	0.2%	1	0.5%	1400	0.4%	1	0.5%	1400	0.4%	0.00	600.00
Travel Agents	2	0.9%	2000	0.5%	1	0.5%	1100	0.3%	1	0.5%	1100	0.3%	-1.00	-900.00
TV, Cable & Video Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Repairs & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Video Tape Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
LEISURE SERVICES	**50**	**22.4%**	**93600**	**25.3%**	**54**	**25.6%**	**78800**	**23.3%**	**56**	**26.7%**	**81920**	**24.3%**	**6.00**	**-11680.00**
Bars & Wine Bars	2	0.9%	4300	1.2%	2	0.9%	5,600	1.7%	2	1.0%	5,600	1.7%	0.00	1300.00
Bingo & Amusements	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Cafes	9	4.0%	10100	2.7%	10	4.7%	12,000	3.6%	10	4.8%	12,000	3.6%	1.00	1900.00
Casinos & Betting Offices	2	0.9%	2000	0.5%	2	0.9%	2,000	0.6%	2	1.0%	2,000	0.6%	0.00	0.00
Cinemas, Theatres & Concert Halls	1	0.4%	9200	2.5%	1	0.5%	9,200	2.7%	1	0.5%	9,200	2.7%	0.00	0.00
Clubs	3	1.3%	11100	3.0%	4	1.9%	12100	3.6%	4	1.9%	12100	3.6%	1.00	1000.00
Disco, Dance & Nightclubs	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Fast Food & Take Away	11	4.9%	13200	3.6%	10	4.7%	13500	4.0%	11	5.2%	14620	4.3%	0.00	1420.00
Hotels & Guest Houses	4	1.8%	15800	4.3%	3	1.4%	14400	4.3%	3	1.4%	14400	4.3%	-1.00	-1400.00
Public Houses	6	2.7%	11200	3.0%	8	3.8%	18700	5.5%	9	4.3%	20700	6.1%	3.00	9500.00
Restaurants	9	4.0%	11800	3.2%	11	5.2%	14600	4.3%	11	5.2%	14600	4.3%	2.00	2800.00
Sports & Leisure Facilities	3	1.3%	4900	1.3%	3	1.4%	5500	1.6%	3	1.4%	5500	1.6%	0.00	600.00
FINANCIAL & BUSINESS SERVICES	**25**	**11.2%**	**38700**	**10.4%**	**22**	**10.4%**	**31100**	**9.2%**	**20**	**9.5%**	**29291**	**8.7%**	**-5.00**	**-9409.00**
Building Societies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Building Supplies & Services	4	1.8%	4900	1.3%	3	1.4%	4000	1.2%	3	1.4%	4000	1.2%	-1.00	-900.00
Business Goods & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Employment & Careers	2	0.9%	2200	0.6%	2	0.9%	2500	0.7%	1	0.5%	1711	0.5%	-1.00	-489.00
Financial Services	2	0.9%	2500	0.7%	3	1.4%	3100	0.9%	2	1.0%	2080	0.6%	0.00	-420.00
Legal Services	3	1.3%	8400	2.3%	2	0.9%	5900	1.7%	2	1.0%	5900	1.8%	-1.00	-2500.00
Other Business Services	2	0.9%	2900	0.8%	1	0.5%	600	0.2%	1	0.5%	600	0.2%	-1.00	-2300.00
Printing & Copying	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Property Services	7	3.1%	5500	1.5%	9	4.3%	9000	2.7%	9	4.3%	9000	2.7%	2.00	3500.00
Retail Banks	5	2.2%	12300	3.3%	2	0.9%	6000	1.8%	2	1.0%	6000	1.8%	-3.00	-6300.00
VACANT	**35**	15.7%	**46100**	12.4%	**27**	12.8%	**44500**	13.2%	**19**	9.0%	**31904**	9.5%	-16.00	-14196.00
TOTAL	**223**	**100.0%**	**370400**	**100.0%**	**211**	**100.0%**	**337800**	**100.0%**	**210**	**100.0%**	**336780**	**100.0%**		

Notes: Experian GOAD data for 2018 and 2024, updated to 2025 by Nexus.

WINCHCOMBE - LAND USE PROFILE, 2019-2025

	2019				2024				2025				Change, 2019 to 2025	
	Units		Floorspace		Units		Floorspace		Units		Floorspace			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	Units	Floorspace
CONVENIENCE	**6**	9.5%	**7500**	10.6%	**6**	10.0%	**8400**	12.2%	**6**	10.2%	**8400**	12.0%	0.00	900.00
Bakers & Confectioners	1	1.6%	2200	3.1%	1	1.7%	2200	3.2%	1	1.7%	2200	3.1%	0.00	0.00
Butchers	1	1.6%	1200	1.7%	1	1.7%	1200	1.7%	1	1.7%	1200	1.7%	0.00	0.00
CTN	1	1.6%	700	1.0%	1	1.7%	700	1.0%	1	1.7%	700	1.0%	0.00	0.00
Convenience Stores	1	1.6%	1000	1.4%	1	1.7%	1000	1.5%	1	1.7%	1000	1.4%	0.00	0.00
Fishmongers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Frozen Foods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Greengrocers	1	1.6%	800	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-800.00
Grocers & Delicatessens	1	1.6%	1600	2.3%	2	3.3%	3300	4.8%	2	3.4%	3300	4.7%	1.00	1700.00
Health Foods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Markets	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Off Licences	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Shoe Repairs Etc	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Supermarkets	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
COMPARISON	**22**	34.9%	**24400**	34.6%	**22**	36.7%	**24500**	35.6%	**21**	35.6%	**23735**	33.8%	-1.00	-665.00
Antique Shops	4	6.3%	5000	7.1%	4	6.7%	5000	7.3%	3	5.1%	4235	6.0%	-1.00	-765.00
Art & Art Dealers	1	1.6%	600	0.9%	2	3.3%	1100	1.6%	2	3.4%	1100	1.6%	1.00	500.00
Booksellers	0	0.0%	0	0.0%	1	1.7%	1100	1.6%	1	1.7%	1100	1.6%	1.00	1100.00
Carpets & Flooring	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Catalogue Showrooms	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Charity Shops	2	3.2%	2100	3.0%	2	3.3%	1700	2.5%	2	3.4%	1700	2.4%	0.00	-400.00
Chemist & Drugstores	1	1.6%	1800	2.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-1800.00
Childrens & Infants Wear	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Clothing General	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Crafts, Gifts, China & Glass	2	3.2%	2400	3.4%	2	3.3%	2400	3.5%	2	3.4%	2400	3.4%	0.00	0.00
Cycles & Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Department & Variety Stores	0	0.0%	0	0.0%	1	1.7%	1800	2.6%	1	1.7%	1800	2.6%	1.00	1800.00
DIY & Home Improvement	2	3.2%	3000	4.3%	1	1.7%	1200	1.7%	1	1.7%	1200	1.7%	-1.00	-1800.00
Electrical & Other Durable Goods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Florists	1	1.6%	1100	1.6%	1	1.7%	1100	1.6%	1	1.7%	1100	1.6%	0.00	0.00
Footwear	1	1.6%	700	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-700.00
Furniture Fitted	3	4.8%	1600	2.3%	2	3.3%	1100	1.6%	2	3.4%	1100	1.6%	-1.00	-500.00
Furniture General	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Gardens & Equipment	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Greeting Cards	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Hardware & Household Goods	1	1.6%	1400	2.0%	1	1.7%	1400	2.0%	1	1.7%	1400	2.0%	0.00	0.00
Jewellery, Watches & Silver	1	1.6%	1400	2.0%	1	1.7%	1400	2.0%	1	1.7%	1400	2.0%	0.00	0.00
Ladies & Mens Wear & Acc.	2	3.2%	2500	3.5%	2	3.3%	2600	3.8%	2	3.4%	2600	3.7%	0.00	100.00
Ladies Wear & Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Leather & Travel Goods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Mens Wear & Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Music & Musical Instruments	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Music & Video Recordings	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Newsagents & Stationers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Office Supplies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Other Comparison Goods	1	1.6%	800	1.1%	1	1.7%	800	1.2%	1	1.7%	800	1.1%	0.00	0.00
Photographic & Optical	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Secondhand Goods, Books, etc.	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Sports, Camping & Leisure Goods	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Telephones & Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Textiles & Soft Furnishings	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Toiletries, Cosmetics & Beauty Products	0	0.0%	0	0.0%	1	1.7%	1800	2.6%	1	1.7%	1800	2.6%	1.00	1800.00
Toys, Games & Hobbies	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle & Motorcycle Sales	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Accessories	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
RETAIL SERVICE	**11**	17.5%	**7800**	11.1%	**10**	16.7%	**6800**	9.9%	**10**	16.9%	**6800**	9.7%	-1.00	-1000.00
Clothing & Fancy Dress Hire	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Dry Cleaners & Launderettes	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Filling Stations	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Health & Beauty	8	12.7%	6200	8.8%	7	11.7%	5200	7.6%	7	11.9%	5200	7.4%	-1.00	-1000.00
Opticians	1	1.6%	500	0.7%	1	1.7%	500	0.7%	1	1.7%	500	0.7%	0.00	0.00
Other Retail Services	1	1.6%	600	0.9%	1	1.7%	600	0.9%	1	1.7%	600	0.9%	0.00	0.00
Photo Processing	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Photo Studio	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Post Offices	1	1.6%	500	0.7%	1	1.7%	500	0.7%	1	1.7%	500	0.7%	0.00	0.00
Repairs, Alterations & Restoration	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Travel Agents	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
TV, Cable & Video Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Vehicle Repairs & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Video Tape Rental	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
LEISURE SERVICES	**12**	19.0%	**20600**	29.2%	**11**	18.3%	**18900**	27.5%	**11**	18.6%	**18900**	26.9%	-1.00	-1700.00
Bars & Wine Bars	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Bingo & Amusements	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Cafes	3	4.8%	3200	4.5%	2	3.3%	2200	3.2%	2	3.4%	2200	3.1%	-1.00	-1000.00
Casinos & Betting Offices	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Cinemas, Theatres & Concert Halls	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Clubs	1	1.6%	4100	5.8%	1	1.7%	4100	6.0%	1	1.7%	4100	5.8%	0.00	0.00
Disco, Dance & Nightclubs	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Fast Food & Take Away	2	3.2%	1800	2.6%	1	1.7%	400	0.6%	1	1.7%	400	0.6%	-1.00	-1400.00
Hotels & Guest Houses	2	3.2%	5300	7.5%	3	5.0%	6700	9.7%	3	5.1%	6700	9.5%	1.00	1400.00
Public Houses	2	3.2%	3900	5.5%	1	1.7%	2500	3.6%	1	1.7%	2500	3.6%	-1.00	-1400.00
Restaurants	2	3.2%	2300	3.3%	3	5.0%	3000	4.4%	3	5.1%	3000	4.3%	1.00	700.00
Sports & Leisure Facilities	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
FINANCIAL & BUSINESS SERVICES	**4**	6.3%	**4300**	6.1%	**2**	3.3%	**2400**	3.5%	**3**	5.1%	**3286**	4.7%	-1.00	-1014.00
Building Societies	1	1.6%	1500	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	-1.00	-1500.00
Building Supplies & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Business Goods & Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Employment & Careers	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Financial Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2	3.4%	2386	3.4%	2.00	2386.00
Legal Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Other Business Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Printing & Copying	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.00	0.00
Property Services	3	4.8%	2800	4.0%	1	1.7%	900	1.3%	1	1.7%	900	1.3%	-2.00	-1900.00
Retail Banks	0	0.0%	0	0.0%	1	1.7%	1500	2.2%	0	0.0%	0	0.0%	0.00	0.00
VACANT	**8**	12.7%	**5900**	8.4%	**9**	15.0%	**7800**	11.3%	**8**	13.6%	**9114**	13.0%	0.00	3214.00
TOTAL	**63**	**100.0%**	**70500**	**100.0%**	**60**	**100.0%**	**68800**	**100.0%**	**59**	**100.0%**	**70235**	**100.0%**		

Notes: Experian GOAD data for 2019 and 2024, updated to 2025 by Nexus.

EXPERIAN GOAD - UK TOWN CENTRE AVERAGE LEVELS - RETAIL AND LEISURE USES

	2018		2019		2020		2021		2022		2023		2024		Change, 2018-2024		Change, 2019-2024	
	Units	Floorspace	Units	Floorspace	Units	Floorspace	Units	Floorspace	Units	Floorspace	Units	Floorspace	Units	Floorspace	Units	Floorspace	Units	Floorspace
CONVENIENCE	**9.01**	**15.24**	**9.26**	**15.31**	**9.12**	**15.38**	**9.27**	**15.49**	**9.30**	**15.33**	**9.27**	**15.49**	**9.35**	**15.27**	**0.34**	**0.03**	**0.09**	**-0.04**
Bakers & Confectioners	1.84	0.89	1.79	0.88	1.71	0.85	1.76	0.87	1.79	0.89	1.81	0.91	1.85	0.94	0.01	0.05	0.06	0.06
Butchers	0.64	0.32	0.60	0.30	0.58	0.29	0.59	0.30	0.59	0.30	0.57	0.29	0.54	0.27	-0.10	-0.05	-0.06	-0.03
CTN	0.97	0.35	1.35	0.50	1.22	0.45	1.12	0.42	1.10	0.41	1.07	0.40	1.07	0.40	0.10	0.05	-0.28	-0.10
Convenience Stores	1.62	1.67	1.67	1.69	1.78	1.73	1.89	1.85	1.92	1.92	2.00	2.04	2.16	2.12	0.54	0.45	0.49	0.43
Fishmongers	0.11	0.05	0.10	0.04	0.11	0.05	0.12	0.05	0.12	0.05	0.12	0.05	0.11	0.05	0.00	0.00	0.01	0.01
Frozen Foods	0.30	0.85	0.30	0.84	0.29	0.84	0.28	0.83	0.28	0.83	0.27	0.81	0.25	0.77	-0.05	-0.08	-0.05	-0.07
Greengrocers	0.28	0.13	0.25	0.12	0.23	0.11	0.23	0.11	0.23	0.11	0.22	0.10	0.21	0.10	-0.07	-0.03	-0.04	-0.02
Grocers & Delicatessens	1.00	0.55	0.96	0.54	0.98	0.58	1.06	0.64	1.08	0.65	1.08	0.66	1.07	0.67	0.07	0.12	0.11	0.13
Health Foods	0.46	0.29	0.46	0.29	0.47	0.30	0.48	0.30	0.48	0.30	0.46	0.29	0.44	0.28	-0.02	-0.01	-0.02	-0.01
Markets	0.14	0.88	0.15	0.88	0.15	0.87	0.14	0.84	0.13	0.81	0.11	0.77	0.12	0.77	-0.02	-0.11	-0.03	-0.11
Off Licences	0.42	0.25	0.41	0.24	0.38	0.21	0.41	0.22	0.41	0.23	0.40	0.23	0.40	0.23	-0.02	-0.02	-0.01	-0.01
Shoe Repairs Etc	0.42	0.12	0.41	0.11	0.41	0.13	0.40	0.13	0.39	0.13	0.38	0.13	0.36	0.12	-0.06	0.00	-0.05	0.01
Supermarkets	0.81	8.89	0.81	8.88	0.81	8.97	0.79	8.93	0.78	8.70	0.78	8.81	0.77	8.55	-0.04	-0.34	-0.04	-0.33
COMPARISON	**30.53**	**34.62**	**33.46**	**33.46**	**27.39**	**31.41**	**27.03**	**30.27**	**26.95**	**30.17**	**26.58**	**29.66**	**26.09**	**28.67**	**-4.44**	**-5.95**	**-7.37**	**-4.79**
Antique Shops	0.39	0.21	0.20	0.20	0.36	0.19	0.36	0.20	0.36	0.20	0.36	0.20	0.34	0.19	-0.05	-0.02	0.14	-0.01
Art & Art Dealers	0.63	0.36	0.36	0.36	0.62	0.36	0.64	0.38	0.65	0.38	0.64	0.37	0.70	0.43	0.07	0.07	0.34	0.07
Booksellers	0.49	0.42	0.43	0.43	0.47	0.43	0.48	0.44	0.48	0.44	0.49	0.44	0.48	0.44	-0.01	0.02	0.05	0.01
Carpets & Flooring	0.54	0.52	0.51	0.51	0.53	0.50	0.53	0.50	0.52	0.49	0.51	0.48	0.49	0.45	-0.05	-0.07	-0.02	-0.06
Catalogue Showrooms	0.13	0.48	0.41	0.41	0.11	0.35	0.08	0.25	0.08	0.23	0.08	0.21	0.08	0.19	-0.05	-0.29	-0.33	-0.22
Charity Shops	2.70	1.84	1.89	1.89	2.54	1.84	2.47	1.83	2.44	1.83	2.42	1.84	2.35	1.83	-0.35	-0.01	0.46	-0.06
Chemist & Drugstores	1.13	1.53	1.52	1.52	1.07	1.47	1.04	1.45	1.03	1.44	1.00	1.42	0.88	1.30	-0.25	-0.23	-0.64	-0.22
Childrens & Infants Wear	0.39	0.28	0.25	0.25	0.32	0.19	0.30	0.18	0.30	0.18	0.28	0.17	0.25	0.15	-0.14	-0.13	0.00	-0.10
Clothing General	1.66	3.25	3.28	3.28	1.58	3.11	1.56	2.99	1.56	2.98	1.56	2.92	1.54	2.81	-0.12	-0.44	-1.74	-0.47
Crafts, Gifts, China & Glass	1.63	0.82	0.82	0.82	1.53	0.77	1.55	0.79	1.56	0.78	1.55	0.80	1.56	0.81	-0.07	-0.01	0.74	-0.01
Cycles & Accessories	0.24	0.19	0.18	0.18	0.22	0.17	0.23	0.18	0.23	0.18	0.23	0.18	0.21	0.16	-0.03	-0.03	0.03	-0.02
Department & Variety Stores	0.42	4.81	4.82	4.82	0.41	4.22	0.37	3.49	0.36	3.49	0.37	3.39	0.27	2.49	-0.15	-2.32	-4.55	-2.33
DIY & Home Improvement	0.69	1.05	1.02	1.02	0.63	0.95	0.64	0.94	0.65	0.94	0.64	0.94	0.60	0.89	-0.09	-0.16	-0.42	-0.13
Electrical & Other Durable Goods	1.20	0.95	0.83	0.83	0.89	0.68	0.87	0.67	0.86	0.66	0.82	0.64	0.75	0.61	-0.45	-0.34	-0.08	-0.22
Florists	0.65	0.23	0.22	0.22	0.57	0.20	0.57	0.21	0.57	0.21	0.54	0.20	0.50	0.18	-0.15	-0.05	0.28	-0.04
Footwear	0.95	0.83	0.80	0.80	0.81	0.74	0.76	0.71	0.74	0.70	0.72	0.69	0.70	0.68	-0.25	-0.15	-0.10	-0.12
Furniture Fitted	0.40	0.36	0.36	0.36	0.39	0.34	0.38	0.33	0.38	0.33	0.38	0.34	0.37	0.33	-0.03	-0.03	0.01	-0.03
Furniture General	0.81	1.32	1.25	1.25	0.70	1.18	0.69	1.19	0.68	1.17	0.65	1.15	0.62	1.09	-0.19	-0.23	-0.63	-0.16
Gardens & Equipment	0.05	0.06	0.06	0.06	0.05	0.06	0.05	0.07	0.06	0.07	0.06	0.07	0.05	0.08	0.00	0.02	-0.01	0.02
Greeting Cards	0.70	0.49	0.47	0.47	0.60	0.43	0.59	0.43	0.59	0.42	0.56	0.41	0.52	0.38	-0.18	-0.11	0.05	-0.09
Hardware & Household Goods	1.37	3.07	2.82	2.82	1.25	2.89	1.29	3.01	1.29	3.02	1.28	3.04	1.28	3.21	-0.09	0.14	-1.54	0.39
Jewellery, Watches & Silver	1.59	0.73	0.71	0.71	1.43	0.66	1.42	0.66	1.42	0.66	1.41	0.66	1.45	0.69	-0.14	-0.04	0.74	-0.02
Ladies & Mens Wear & Acc.	1.66	2.29	2.31	2.31	1.50	2.20	1.49	2.15	1.49	2.17	1.49	2.15	1.59	2.21	-0.07	-0.08	-0.72	-0.10
Ladies Wear & Accessories	1.99	1.59	1.43	1.43	1.44	1.13	1.28	0.95	1.24	0.93	1.19	0.89	1.13	0.85	-0.86	-0.74	-0.30	-0.58
Leather & Travel Goods	0.14	0.08	0.07	0.07	0.10	0.06	0.10	0.05	0.10	0.05	0.09	0.05	0.09	0.06	-0.05	-0.02	0.02	-0.01
Mens Wear & Accessories	0.70	0.60	0.53	0.53	0.57	0.46	0.53	0.38	0.53	0.38	0.51	0.37	0.54	0.38	-0.16	-0.22	0.01	-0.15
Music & Musical Instruments	0.14	0.09	0.08	0.08	0.10	0.07	0.09	0.06	0.09	0.06	0.08	0.05	0.07	0.05	-0.07	-0.04	-0.01	-0.03
Music & Video Recordings	0.17	0.16	0.13	0.13	0.18	0.14	0.19	0.15	0.19	0.15	0.20	0.16	0.22	0.17	0.05	0.01	0.09	0.04
Newsagents & Stationers	0.85	0.75	0.58	0.58	0.51	0.56	0.50	0.53	0.49	0.52	0.47	0.49	0.46	0.46	-0.39	-0.29	-0.12	-0.12
Office Supplies	0.02	0.02	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	-0.01	-0.01	-0.01	-0.01
Other Comparison Goods	0.84	0.58	0.59	0.59	0.95	0.62	1.02	0.66	1.06	0.70	1.09	0.72	1.06	0.68	0.22	0.10	0.47	0.09
Photographic & Optical	0.11	0.05	0.05	0.05	0.09	0.04	0.08	0.04	0.08	0.04	0.08	0.04	0.08	0.04	-0.03	-0.01	0.03	-0.01
Secondhand Goods, Books, etc.	0.30	0.16	0.15	0.15	0.30	0.15	0.30	0.16	0.29	0.16	0.28	0.15	0.26	0.14	-0.04	-0.02	0.11	-0.01
Sports, Camping & Leisure Goods	0.67	1.00	1.00	1.00	0.63	1.02	0.61	1.01	0.60	1.00	0.60	0.99	0.59	1.01	-0.08	0.01	-0.41	0.01
Telephones & Accessories	1.38	0.68	0.67	0.67	1.33	0.60	1.37	0.61	1.38	0.61	1.39	0.61	1.42	0.61	0.04	-0.07	0.75	-0.06
Textiles & Soft Furnishings	0.64	0.47	0.43	0.43	0.55	0.42	0.52	0.41	0.52	0.40	0.50	0.38	0.47	0.38	-0.17	-0.09	0.04	-0.05
Toiletries, Cosmetics & Beauty Products	1.00	0.93	0.95	0.95	1.01	0.97	1.03	0.99	1.03	0.99	1.04	1.00	1.12	1.05	0.12	0.12	0.17	0.10
Toys, Games & Hobbies	0.76	0.68	0.60	0.60	0.67	0.57	0.68	0.57	0.68	0.57	0.67	0.57	0.65	0.58	-0.11	-0.10	0.05	-0.02
Vehicle & Motorcycle Sales	0.25	0.49	0.47	0.47	0.24	0.48	0.24	0.48	0.24	0.47	0.23	0.47	0.23	0.46	-0.02	-0.03	-0.24	-0.01
Vehicle Accessories	0.15	0.20	0.19	0.19	0.13	0.18	0.12	0.16	0.12	0.16	0.11	0.15	0.11	0.14	-0.04	-0.06	-0.08	-0.05
RETAIL SERVICE	**14.61**	**6.85**	**15.69**	**7.02**	**15.62**	**7.19**	**15.73**	**7.21**	**15.74**	**7.21**	**15.75**	**7.25**	**15.77**	**7.20**	**1.16**	**0.35**	**0.08**	**0.18**
Clothing & Fancy Dress Hire	0.08	0.04	0.07	0.03	0.05	0.03	0.05	0.03	0.05	0.03	0.04	0.02	0.04	0.02	-0.04	-0.02	-0.03	-0.01
Dry Cleaners & Launderettes	0.74	0.31	0.72	0.30	0.68	0.28	0.66	0.28	0.65	0.28	0.62	0.27	0.59	0.25	-0.15	-0.06	-0.13	-0.05
Filling Stations	0.22	0.11	0.22	0.10	0.23	0.12	0.23	0.11	0.23	0.11	0.23	0.11	0.23	0.12	0.01	0.01	0.01	0.02
Health & Beauty	9.13	3.48	9.70	3.70	10.38	3.96	10.64	4.07	10.70	4.09	10.83	4.15	10.98	4.22	1.85	0.74	1.28	0.52
Opticians	1.33	0.75	1.32	0.73	1.28	0.72	1.27	0.72	1.27	0.73	1.27	0.74	1.24	0.72	-0.09	-0.03	-0.08	-0.01
Other Retail Services	0.63	0.41	0.66	0.43	0.65	0.43	0.64	0.43	0.64	0.43	0.63	0.43	0.61	0.41	-0.02	0.00	-0.05	-0.02
Photo Processing	0.12	0.04	0.13	0.05	0.14	0.06	0.14	0.06	0.14	0.06	0.14	0.06	0.14	0.06	0.02	0.02	0.01	0.01
Photo Studio	0.15	0.06	0.14	0.06	0.12	0.05	0.12	0.05	0.12	0.05	0.11	0.05	0.11	0.05	-0.04	-0.01	-0.03	-0.01
Post Offices	0.50	0.41	0.50	0.38	0.49	0.34	0.49	0.33	0.49	0.32	0.48	0.32	0.47	0.29	-0.03	-0.12	-0.03	-0.09
Repairs, Alterations & Restoration	0.30	0.10	0.31	0.10	0.30	0.10	0.30	0.10	0.29	0.10	0.28	0.09	0.28	0.09	-0.02	-0.01	-0.03	-0.01
Travel Agents	0.80	0.43	0.77	0.41	0.67	0.35	0.59	0.30	0.57	0.29	0.55	0.29	0.54	0.28	-0.26	-0.15	-0.23	-0.13
TV, Cable & Video Rental	0.06	0.01	0.07	0.01	0.08	0.01	0.05	0.01	0.05	0.01	0.04	0.01	0.04	0.01	-0.02	0.00	-0.03	0.00
Vehicle Rental	0.06	0.05	0.60	0.05	0.05	0.05	0.05	0.04	0.05	0.04	0.04	0.04	0.04	0.04	-0.02	-0.01	-0.56	-0.01
Vehicle Repairs & Services	0.49	0.65	0.48	0.67	0.50	0.69	0.50	0.68	0.49	0.67	0.49	0.67	0.46	0.64	-0.03	-0.01	-0.02	-0.03
Video Tape Rental	0.02	0.01	0.01	0.00	0.01	0.00	0.01	0.00	0.01	0.00	0.01	0.00	0.00	0.00	-0.02	-0.01	-0.01	0.00
LEISURE SERVICES	**24.06**	**25.12**	**24.54**	**25.67**	**24.53**	**25.69**	**24.95**	**25.89**	**25.21**	**26.06**	**25.63**	**26.58**	**26.54**	**27.71**	**2.48**	**2.59**	**2.00**	**2.04**
Bars & Wine Bars	1.80	2.11	1.95	2.21	2.04	2.20	2.16	2.29	2.22	2.34	2.30	2.42	2.39	2.51	0.59	0.40	0.44	0.30
Bingo & Amusements	0.37	0.81	0.40	0.85	0.42	0.88	0.44	0.89	0.45	0.92	0.46	0.95	0.48	0.98	0.11	0.17	0.08	0.13
Cafes	4.64	2.59	4.81	2.73	4.79	2.73	4.92	2.80	4.97	2.81	5.09	2.89	5.24	2.96	0.60	0.37	0.43	0.23
Casinos & Betting Offices	1.41	1.10	1.32	1.04	1.10	0.88	1.06	0.85	1.04	0.84	1.01	0.83	0.97	0.80	-0.44	-0.30	-0.35	-0.24
Cinemas, Theatres & Concert Halls	0.27	1.74	0.28	1.79	0.29	1.81	0.29	1.83	0.30	1.84	0.31	1.90	0.33	1.96	0.06	0.22	0.05	0.17
Clubs	0.60	1.05	0.59	1.04	0.57	1.01	0.56	1.00	0.56	0.99	0.56	0.99	0.56	1.02	-0.04	-0.03	-0.03	-0.02
Disco, Dance & Nightclubs	0.21	0.43	0.20	0.39	0.18	0.36	0.18	0.35	0.18	0.34	0.17	0.32	0.17	0.31	-0.04	-0.12	-0.03	-0.08
Fast Food & Take Away	5.77	2.82	5.79	2.86	5.85	2.90	5.99	2.98	6.04	3.01	6.12	3.09	6.15	3.12	0.38	0.30	0.36	0.26
Hotels & Guest Houses	0.73	2.15	0.80	2.34	0.86	2.48	0.87	2.53	0.87	2.55	0.88	2.60	0.95	2.92	0.22	0.77	0.15	0.58
Public Houses	2.64	3.52	2.62	3.47	2.61	3.47	2.60	3.46	2.60	3.45	2.58	3.42	2.60	3.38	-0.04	-0.14	-0.02	-0.09
Restaurants	4.69	4.22	4.76	4.21	4.73	4.11	4.76	4.09	4.84	4.13	4.99	4.24	5.47	4.58	0.78	0.36	0.71	0.37
Sports & Leisure Facilities	0.93	2.58	1.02	2.74	1.09	2.86	1.12	2.82	1.14	2.84	1.16	2.93	1.23	3.17	0.30	0.59	0.21	0.43
FINANCIAL & BUSINESS SERVICES	**10.23**	**7.64**	**9.77**	**7.28**	**9.22**	**6.94**	**8.95**	**6.75**	**8.82**	**6.65**	**8.49**	**6.39**	**7.94**	**6.05**	**-2.29**	**-1.59**	**-1.83**	**-1.23**
Building Societies	0.43	0.33	0.41	0.31	0.39	0.30	0.38	0.30	0.38	0.30	0.37	0.29	0.35	0.28	-0.08	-0.05	-0.06	-0.03
Building Supplies & Services	0.50	0.44	0.50	0.43	0.48	0.43	0.48	0.42	0.48	0.42	0.47	0.43	0.45	0.41	-0.05	-0.03	-0.05	-0.02
Business Goods & Services	0.02	0.01	0.02	0.01	0.03	0.01	0.03	0.01	0.02	0.01	0.02	0.01	0.02	0.01	0.00	0.00	0.00	0.00
Employment & Careers	0.44	0.25	0.42	0.23	0.39	0.22	0.34	0.19	0.32	0.18	0.30	0.17	0.27	0.15	-0.17	-0.10	-0.15	-0.08
Financial Services	1.29	0.72	1.29	0.72	1.33	0.75	1.35	0.75	1.35	0.75	1.31	0.73	1.23	0.69	-0.06	-0.03	-0.06	-0.03
Legal Services	1.07	0.77	1.09	0.79	1.09	0.79	1.07	0.78	1.07	0.77	1.04	0.76	0.99	0.72	-0.08	-0.05	-0.10	-0.07
Other Business Services	0.37	0.41	0.36	0.42	0.35	0.45	0.38	0.50	0.37	0.51	0.37	0.52	0.41	0.63	0.04	0.22	0.05	0.21
Printing & Copying	0.28	0.15	0.27	0.15	0.26	0.14	0.26	0.14	0.25	0.14	0.24	0.13	0.23	0.13	-0.05	-0.02	-0.04	-0.02
Property Services	3.55	1.85	3.40	1.79	3.16	1.67	3.11	1.65	3.10	1.64	3.03	1.61	2.83	1.54	-0.72	-0.31	-0.57	-0.25
Retail Banks	2.28	2.71	2.01	2.43	1.74	2.18	1.55	2.01	1.48	1.93	1.34	1.74	1.16	1.49	-1.12	-1.22	-0.85	-0.94
VACANT	**11.26**	**9.85**	**11.95**	**10.62**	**13.86**	**12.75**	**13.84**	**13.80**	**13.82**	**13.81**	**14.07**	**13.88**	**14.14**	**14.46**	**2.88**	**4.61**	**2.19**	**3.84**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**				

Notes:
National average unit and floorspace proportionate data provided by Experian GOAD - using their Category Report format.

Appendix C: Market Share & Quantitative Assessment

TABLE 1: POPULATION LEVELS WITHIN STUDY AREA, BY ZONE

	ZONE																				Total
	1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	
2025	30,295	41,582	16,531	33,271	20,059	25,589	8,259	10,544	40,807	33,755	71,835	40,099	15,062	43,010	76,775	79,444	36,932	28,338	37,833	26,756	716,776

Notes:
Population data provided by Experian (June 2025).

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

	ZONE																			
	1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13
2025	£3,099	£2,804	£3,218	£3,287	£3,164	£3,482	£3,587	£3,506	£2,669	£2,810	£2,938	£3,081	£3,322	£3,290	£3,089	£3,254	£3,297	£3,091	£3,147	£3,135

Notes:
Per capita expenditure data provided by Experian (June 2025) and projected forward using forecasts contained within Experian's Retail Planner Briefing Note 22 (March 2025) (forecasts based on adjusted convenience goods expenditure growth).

TABLE 2b: PER CAPITA COMPARISON GOODS EXPENDITURE, BY ZONE

	ZONE																			
	1a	**1b**	**1c**	**1d**	**2**	**3a**	**3b**	**4**	**5a**	**5b**	**5c**	**5d**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**
2025	£4,768	£3,939	£5,141	£5,013	£4,815	£5,143	£5,526	£5,639	£3,613	£4,162	£4,215	£4,676	£4,919	£4,960	£4,524	£4,889	£5,032	£4,252	£4,364	£4,558

Notes:

Per capita expenditure data provided by Experian (June 2025) and projected forward using forecasts contained within Experian's Retail Planner Briefing Note 22 (March 2025) (forecasts based on adjusted convenience goods expenditure growth).

TABLE 2c: PER CAPITA EXPENDITURE ON CLASS E(b) FOOD & BEVERAGE USES, BY ZONE

	ZONE																			
	1a	**1b**	**1c**	**1d**	**2**	**3a**	**3b**	**4**	**5a**	**5b**	**5c**	**5d**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**
2025	£1,131	£796	£1,295	£1,257	£1,039	£1,096	£1,262	£1,365	£646	£830	£877	£1,037	£1,019	£1,029	£813	£1,042	£1,122	£822	£859	£913

Notes:
Per capita expenditure data provided by Experian (June 2025) and projected forward using forecasts contained within Experian's Retail Planner Briefing Note 22 (March 2025).

TABLE 2d: PER CAPITA EXPENDITURE ON SUI GENERIS FOOD & BEVERAGE USES, BY ZONE

	ZONE																			
	1a	**1b**	**1c**	**1d**	**2**	**3a**	**3b**	**4**	**5a**	**5b**	**5c**	**5d**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**
2025	£1,155	£919	£1,204	£1,262	£1,014	£931	£1,036	£1,124	£871	£936	£928	£1,016	£876	£975	£832	£1,004	£1,036	£798	£820	£860

Notes:
Per capita expenditure data provided by Experian (June 2025) and projected forward using forecasts contained within Experian's Retail Planner Briefing Note 22 (March 2025).

TABLE 3a: TOTAL CONVENIENCE GOODS EXPENDITURE WITHIN STUDY AREA, BY ZONE

	ZONE																				Total
	1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	
2025	£93.9	£116.6	£53.2	£109.4	£63.5	£89.1	£29.6	£37.0	£108.9	£94.8	£211.0	£123.5	£50.0	£141.5	£237.1	£258.5	£121.8	£87.6	£119.1	£83.9	£2,230.0

Notes:
Total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2a).

TABLE 3b: TOTAL COMPARISON GOODS EXPENDITURE WITHIN STUDY AREA, BY ZONE

	ZONE																				Total
	1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	
2025	£144.4	£163.8	£85.0	£166.8	£96.6	£131.6	£45.6	£59.5	£147.4	£140.5	£302.8	£187.5	£74.1	£213.3	£347.4	£388.4	£185.9	£120.5	£165.1	£121.9	£3,288.1

Notes:
Total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2b).

TABLE 3c: TOTAL EXPENDITURE ON CLASS E(b) FOOD AND BEVERAGE USES WITHIN STUDY AREA, BY ZONE

	ZONE																			Total
	1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	
2025	£34.3	£33.1	£21.4	£41.8	£20.8	£28.1	£10.4	£14.4	£26.3	£28.0	£63.0	£41.6	£15.4	£44.3	£62.4	£82.8	£41.4	£23.3	£32.5	£24.4	£689.7

Notes:
Total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2c).

TABLE 3d: TOTAL EXPENDITURE ON SUI GENERIS FOOD AND BEVERAGE USES WITHIN STUDY AREA, BY ZONE

	ZONE																				Total
	1a	**1b**	**1c**	**1d**	**2**	**3a**	**3b**	**4**	**5a**	**5b**	**5c**	**5d**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	
2025	£35.0	£38.2	£19.9	£42.0	£20.3	£23.8	£8.6	£11.8	£35.5	£31.6	£66.7	£40.8	£13.2	£41.9	£63.9	£79.7	£38.3	£22.6	£31.0	£23.0	£687.9

Notes:
Total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2d).

TABLE 4: CONVENIENCE GOODS SHOPPING MARKET SHARE, BY ZONE

LOCATION	STORE / LOCATION	ZONE																			
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13
Gloucester	Morrisons, Metz Way	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.1%	3.7%	0.7%	3.8%	2.0%	0.9%	0.1%	0.0%	0.2%	0.0%	0.7%	0.2%	0.1%
Gloucester	Asda, Bruton Way	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	9.5%	2.0%	4.2%	2.9%	1.3%	0.4%	0.0%	0.4%	0.0%	1.9%	0.6%	0.2%
Gloucester	Iceland, Gloucester City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Gloucester	Gloucester City Centre	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%	2.1%	0.6%	0.5%	0.4%	0.3%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%	0.0%
Gloucester	Farmfoods, Quedgeley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.9%	0.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.1%
Gloucester	Tesco, Quedgeley	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	3.1%	25.2%	3.6%	0.5%	0.7%	0.1%	0.0%	2.7%	0.0%	0.7%	0.1%	1.9%
Gloucester	Aldi, Quedgeley	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	5.3%	0.8%	0.2%	0.1%	0.0%	0.0%	0.8%	0.0%	0.1%	0.0%	0.4%
Gloucester	Other stores in Quedgeley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Gloucester	Morrisons, Abbeydale	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%	0.4%	8.6%	0.3%	0.1%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%
Gloucester	Tesco, St Oswalds	0.2%	0.3%	0.3%	0.2%	0.2%	0.2%	0.3%	0.1%	11.3%	1.1%	1.5%	14.6%	14.4%	1.2%	0.0%	0.2%	0.0%	7.6%	1.4%	0.1%
Gloucester	Lidl, Mercia Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.2%	0.3%	3.4%	3.2%	0.2%	0.0%	0.1%	0.0%	1.1%	0.2%	0.0%
Gloucester	Aldi, Clifton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	1.0%	0.7%	0.5%	1.5%	0.1%	0.0%	0.1%	0.0%	0.5%	0.1%	0.1%
Gloucester	Iceland, The Peel Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.5%	0.4%	0.2%	0.3%	0.0%	0.0%	0.1%	0.0%	0.4%	0.1%	0.1%
Gloucester	Lidl, Bristol Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.7%	0.7%	0.1%	0.2%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%
Gloucester	Co-op, Longlevens	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gloucester	Asda, Kingsway	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.6%	9.3%	0.8%	0.2%	0.4%	0.1%	0.0%	1.1%	0.0%	0.2%	0.1%	0.8%
Gloucester	Lidl, Kingsway	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	6.8%	0.5%	0.1%	0.1%	0.0%	0.0%	0.9%	0.0%	0.1%	0.0%	0.4%
Gloucester	Sainsburys, Gloucester Quays	0.1%	0.2%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	7.8%	7.8%	2.0%	2.1%	4.5%	0.6%	0.0%	0.8%	0.0%	2.8%	0.7%	0.5%
Gloucester	Tesco, Churchdown	0.1%	0.3%	0.1%	0.2%	0.1%	0.0%	0.0%	0.1%	0.2%	0.1%	0.2%	6.5%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gloucester	Aldi, Hucclecote	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.9%	0.1%	5.3%	2.4%	0.4%	0.0%	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%
Gloucester	Sainsburys, Barnwood	0.3%	0.5%	1.0%	0.5%	0.1%	0.2%	0.2%	2.0%	3.3%	0.8%	7.0%	10.0%	2.4%	0.4%	0.0%	0.5%	0.4%	0.8%	0.2%	0.3%
Gloucester	Farmfoods, Eastern Avenue	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.1%	0.7%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Gloucester	Lidl, Eastern Avenue	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.3%	3.3%	1.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%
Gloucester	Other stores in Gloucester	0.3%	0.6%	0.2%	0.4%	0.2%	0.1%	0.1%	0.3%	15.3%	5.2%	10.1%	8.0%	1.6%	0.4%	0.0%	1.1%	0.1%	0.9%	0.4%	7.5%
Cheltenham	Iceland, Cheltenham town centre	0.4%	0.1%	0.2%	0.1%	0.0%	0.0%	0.1%	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%
Cheltenham	Sainsburys, Cheltenham town centre	0.6%	0.1%	0.4%	0.2%	0.1%	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%
Cheltenham	Tesco, Cheltenham town centre	0.7%	0.2%	0.3%	0.4%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Other stores in Cheltenham town centre	0.4%	0.3%	0.4%	0.8%	0.1%	0.0%	0.1%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Iceland, Coronation Square	0.0%	1.0%	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%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Farmfoods, Coronation Square	0.0%	0.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Other stores Coronation Square	0.1%	1.3%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Sainsburys, Bath Road	0.3%	0.1%	1.5%	1.4%	0.1%	0.0%	0.2%	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%
Cheltenham	Co-op, Bath Road	0.2%	0.1%	3.2%	1.7%	0.1%	0.0%	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%
Cheltenham	Other stores, Bath Road	0.4%	0.2%	2.2%	1.2%	0.1%	0.0%	0.5%	1.1%	0.0%	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Morrisons, Caernarvon Road	1.5%	2.5%	11.3%	16.6%	0.5%	0.1%	0.8%	8.1%	0.1%	0.1%	0.6%	0.8%	0.1%	0.2%	0.0%	0.2%	0.1%	0.1%	0.0%	0.0%
Cheltenham	Tesco, Queens Road	0.2%	1.4%	0.2%	1.1%	0.1%	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%
Cheltenham	Tesco, Brewery Quarter, Cheltenham town centre	0.4%	0.8%	0.2%	0.6%	0.2%	0.0%	0.1%	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%
Cheltenham	Waitrose, Honeybourne Way	5.6%	5.2%	9.4%	12.8%	1.8%	0.5%	4.3%	6.3%	0.3%	0.2%	0.5%	1.2%	0.7%	1.6%	0.1%	0.2%	0.2%	0.2%	0.0%	0.1%
Cheltenham	Lidl, Swindon Road	2.9%	2.0%	0.7%	0.9%	0.2%	0.1%	0.2%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Co-op, Wymans Brooks	0.1%	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%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Aldi, Tewkesbury Road	2.0%	5.0%	0.4%	0.4%	1.5%	0.1%	0.9%	0.2%	0.1%	0.0%	0.0%	0.5%	0.3%	0.9%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Cheltenham	Asda, Hatherley Lane	1.7%	6.5%	2.3%	9.8%	1.4%	0.1%	0.3%	2.9%	0.2%	0.3%	0.5%	2.3%	0.3%	1.0%	0.1%	0.2%	0.0%	0.6%	0.1%	0.1%
Cheltenham	Tesco, Collets Drive	6.6%	18.9%	3.9%	7.0%	3.3%	0.6%	3.5%	3.7%	0.1%	0.1%	0.1%	0.7%	0.2%	1.9%	0.2%	0.1%	0.1%	0.1%	0.0%	0.1%
Cheltenham	Marks & Spencer, Tewkesbury Road	0.3%	0.4%	0.2%	0.2%	0.3%	0.0%	0.5%	0.2%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Lidl, Tewkesbury Road	1.2%	2.9%	0.5%	0.6%	0.5%	0.0%	0.3%	0.3%	0.0%	0.0%	0.1%	0.2%	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Sainsburys, Tewkesbury Road	4.9%	11.2%	2.3%	2.9%	5.7%	0.3%	3.9%	1.9%	0.2%	0.1%	0.3%	1.5%	1.0%	5.1%	0.3%	0.1%	0.0%	0.3%	0.1%	0.0%
Cheltenham	Sainsburys, Oakley	21.8%	0.8%	4.7%	0.8%	1.4%	0.2%	4.1%	4.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%
Cheltenham	Co-op, London Road	1.0%	0.1%	0.6%	0.0%	0.0%	0.1%	0.1%	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%
Cheltenham	Co-op, Leckhampton Road	0.1%	0.1%	2.3%	0.2%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Co-op, Charlton Kings	0.2%	0.0%	1.4%	0.0%	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cheltenham	Sainsburys Local, Cirencester Road	0.3%	0.0%	2.2%	0.1%	0.0%	0.0%	0.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Cheltenham	Lidl, Cirencester Road	2.0%	0.2%	5.7%	0.3%	0.1%	0.1%	0.6%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Cheltenham	Other stores in Cheltenham	9.3%	7.7%	5.6%	6.7%	1.8%	0.5%	1.5%	5.4%	0.2%	0.2%	0.4%	0.7%	0.3%	1.1%	0.1%	0.2%	0.2%	0.2%	0.0%	0.1%
Tewkesbury	Tesco, Tewkesbury town centre	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	3.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tewkesbury	Aldi, Gloucester Road	0.0%	0.1%	0.0%	0.0%	0.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.8%	8.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tewkesbury	Other stores in Tewkesbury town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tewkesbury	Morrisons, Ashchurch Road	0.1%	0.2%	0.1%	0.1%	0.7%	0.0%	0.6%	0.1%	0.1%	0.1%	0.1%	0.2%	0.7%	14.8%	0.3%	0.1%	0.0%	0.1%	0.0%	0.0%
Tewkesbury	Co-op, Northway	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%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tewkesbury	Other stores in Tewkesbury / Ashchurch	0.1%	0.1%	0.0%	0.1%	0.2%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishops Cleeve	Co-op, The Green	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishops Cleeve	Tesco, Church Road	4.6%	1.2%	0.4%	0.3%	32.1%	0.0%	7.4%	0.4%	0.0%	0.0%	0.0%	0.1%	0.1%	2.5%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishops Cleeve	Lidl, Evesham Road	0.9%	0.3%	0.1%	0.1%	9.3%	0.0%	1.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishops Cleeve	Other stores in Bichops Cleeve	0.1%	0.1%	0.0%	0.1%	1.9%	0.0%	0.5%	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%
Winchcombe	Morrisons Daily, North Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Winchcombe	Morrisons Daily, North Street	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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Winchcombe	Co-op, Greet Road	0.1%	0.1%	0.0%	0.0%	0.2%	0.0%	10.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Winchcombe	Other stores in Winchcombe	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	3.7%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Brockworth	Tesco, Gloucester Business Park	0.8%	0.5%	2.1%	1.0%	0.5%	0.2%	0.3%	4.7%	1.6%	0.9%	17.5%	4.2%	0.6%	0.3%	0.0%	0.7%	0.2%	0.4%	0.1%	0.3%
Brockworth	Co-op, Court Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brockworth	Morrisons Daily, Court Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brockworth	Morrisons Daily, Court Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brockworth	Co-op, Abbotswood Shopping Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brockworth	Other stores in Brockworth	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.5%	0.1%	0.1%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Churchdown	Other stores in Churchdown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Elsewhere	Other Stores Outside SLP area	11.1%	10.2%	13.0%	14.3%	15.0%	77.4%	26.8%	25.3%	8.8%	11.8%	7.6%	10.6%	44.0%	28.2%	79.8%	72.9%	80.2%	63.0%	77.6%	70.7%
Online	Online	15.0%	13.4%	19.6%	14.8%	17.9%	18.4%	23.8%	17.8%	12.0%	14.9%	14.3%	17.2%	17.1%	18.9%	17.5%	15.4%	17.6%	15.9%	17.6%	15.5%
Total	**Total**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: market shares calculated using spending data provided by Experian.

TABLE 5a: CONVENIENCE GOODS TURNOVER, 2025, BY ZONE

LOCATION	STORE / LOCATION	ZONE																				STUDY AREA	INFLOW	INFLOW	TOTAL
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	TURNOVER (£m)	(%)	(£m)	(£m)
Gloucester	Morrisons, Metz Way	£0.1	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£4.0	£0.7	£8.1	£2.5	£0.4	£0.1	£0.0	£0.5	£0.1	£0.6	£0.2	£0.1	**£17.9**	7.2%	£1.3	**£19.1**
Gloucester	Asda, Bruton Way	£0.2	£0.2	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£10.4	£1.9	£8.8	£3.6	£0.6	£0.6	£0.1	£0.9	£0.1	£1.7	£0.7	£0.2	**£30.3**	7.3%	£2.2	**£32.5**
Gloucester	Iceland, Gloucester City Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	**£1.3**	3.7%	£0.0	**£1.3**
Gloucester	Gloucester City Centre	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£2.2	£0.5	£1.1	£0.5	£0.1	£0.0	£0.0	£0.3	£0.0	£0.2	£0.1	£0.0	**£5.5**	16.6%	£0.9	**£6.4**
Gloucester	Farmfoods, Quedgeley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.9	£0.4	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.1	**£2.1**	4.4%	£0.1	**£2.2**
Gloucester	Tesco, Quedgeley	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£3.3	£23.9	£7.6	£0.6	£0.4	£0.2	£0.0	£6.9	£0.0	£0.6	£0.1	£1.6	**£45.6**	4.8%	£2.2	**£47.8**
Gloucester	Aldi, Quedgeley	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.4	£5.1	£1.8	£0.2	£0.1	£0.1	£0.0	£2.0	£0.0	£0.1	£0.0	£0.3	**£10.1**	3.8%	£0.4	**£10.4**
Gloucester	Other stores in Quedgeley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	**£2.0**	6.6%	£0.1	**£2.2**
Gloucester	Morrisons, Abbeydale	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.4	£18.1	£0.4	£0.0	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.0	**£20.5**	10.5%	£2.1	**£22.6**
Gloucester	Tesco, St Oswalds	£0.2	£0.4	£0.1	£0.2	£0.1	£0.2	£0.1	£0.1	£12.3	£1.1	£3.2	£18.0	£7.2	£1.7	£0.1	£0.5	£0.1	£6.6	£1.7	£0.1	**£53.7**	6.3%	£3.4	**£57.1**
Gloucester	Lidl, Mercia Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.1	£0.2	£0.7	£4.2	£1.6	£0.2	£0.0	£0.2	£0.0	£1.0	£0.2	£0.0	**£11.6**	4.7%	£0.5	**£12.2**
Gloucester	Aldi, Clifton Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.4	£0.9	£1.6	£0.6	£0.7	£0.2	£0.0	£0.2	£0.0	£0.4	£0.1	£0.1	**£10.3**	4.5%	£0.5	**£10.8**
Gloucester	Iceland, The Peel Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.4	£0.8	£0.3	£0.2	£0.0	£0.0	£0.3	£0.0	£0.3	£0.1	£0.1	**£3.4**	5.9%	£0.2	**£3.6**
Gloucester	Lidl, Bristol Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7	£0.7	£1.4	£0.2	£0.1	£0.1	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	**£7.5**	4.1%	£0.3	**£7.8**
Gloucester	Co-op, Longlevens	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.9**	4.9%	£0.1	**£2.0**
Gloucester	Asda, Kingsway	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£8.8	£1.7	£0.2	£0.2	£0.1	£0.0	£3.0	£0.0	£0.2	£0.1	£0.7	**£15.9**	9.2%	£1.5	**£17.4**
Gloucester	Lidl, Kingsway	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£6.4	£1.2	£0.1	£0.0	£0.0	£0.0	£2.3	£0.0	£0.1	£0.0	£0.4	**£10.9**	5.9%	£0.6	**£11.6**
Gloucester	Sainsburys, Gloucester Quays	£0.1	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£8.5	£7.4	£4.1	£2.6	£2.3	£0.8	£0.1	£2.1	£0.0	£2.5	£0.8	£0.4	**£32.1**	11.9%	£3.8	**£35.9**
Gloucester	Tesco, Churchdown	£0.1	£0.4	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.4	£8.1	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	**£10.0**	7.3%	£0.7	**£10.7**
Gloucester	Aldi, Hucclecote	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£11.2	£3.0	£0.2	£0.1	£0.0	£0.2	£0.0	£0.3	£0.0	£0.0	**£16.3**	5.2%	£0.8	**£17.1**
Gloucester	Sainsburys, Barnwood	£0.3	£0.6	£0.5	£0.5	£0.1	£0.2	£0.1	£0.7	£3.6	£0.8	£14.8	£12.4	£1.2	£0.5	£0.1	£1.2	£0.4	£0.7	£0.3	£0.2	**£39.2**	12.0%	£4.7	**£43.9**
Gloucester	Farmfoods, Eastern Avenue	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£1.4	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	**£2.5**	4.2%	£0.1	**£2.6**
Gloucester	Lidl, Eastern Avenue	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£0.3	£7.0	£1.2	£0.1	£0.0	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	**£11.3**	4.0%	£0.5	**£11.7**
Gloucester	Other stores in Gloucester	£0.3	£0.7	£0.1	£0.4	£0.1	£0.1	£0.0	£0.1	£16.7	£5.0	£21.3	£9.8	£0.8	£0.6	£0.1	£3.0	£0.1	£0.8	£0.4	£6.3	**£66.8**	13.2%	£8.8	**£75.6**
Cheltenham	Iceland, Cheltenham town centre	£0.4	£0.1	£0.1	£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	£0.0	£0.0	**£0.9**	5.5%	£0.1	**£1.0**
Cheltenham	Sainsburys, Cheltenham town centre	£0.5	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.4**	21.4%	£0.3	**£1.6**
Cheltenham	Tesco, Cheltenham town centre	£0.7	£0.2	£0.1	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.9**	22.3%	£0.4	**£2.4**
Cheltenham	Other stores in Cheltenham town centre	£0.3	£0.3	£0.2	£0.9	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	**£2.4**	24.1%	£0.6	**£3.0**
Cheltenham	Iceland, Coronation Square	£0.0	£1.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.4**	2.4%	£0.0	**£1.4**
Cheltenham	Farmfoods, Coronation Square	£0.0	£0.5	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.6**	2.9%	£0.0	**£0.6**
Cheltenham	Other stores Coronation Square	£0.1	£1.5	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.7**	5.6%	£0.1	**£1.8**
Cheltenham	Sainsburys, Bath Road	£0.3	£0.1	£0.8	£1.5	£0.0	£0.0	£0.1	£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	**£3.2**	9.1%	£0.3	**£3.5**
Cheltenham	Co-op, Bath Road	£0.2	£0.1	£1.7	£1.9	£0.1	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£4.4**	7.2%	£0.3	**£4.7**
Cheltenham	Other stores, Bath Road	£0.4	£0.2	£1.2	£1.3	£0.1	£0.0	£0.1	£0.4	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	**£4.1**	9.3%	£0.4	**£4.5**
Cheltenham	Morrisons, Caernarvon Road	£1.4	£2.9	£6.0	£18.2	£0.3	£0.1	£0.3	£3.0	£0.1	£0.1	£1.3	£1.0	£0.1	£0.2	£0.1	£0.5	£0.1	£0.1	£0.0	£0.0	**£35.9**	5.4%	£1.9	**£37.8**
Cheltenham	Tesco, Queens Road	£0.2	£1.6	£0.1	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£3.4**	17.5%	£0.6	**£4.0**
Cheltenham	Tesco, Brewery Quarter, Cheltenham town centre	£0.4	£0.9	£0.1	£0.7	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	**£2.5**	23.1%	£0.6	**£3.1**
Cheltenham	Waitrose, Honeybourne Way	£5.3	£6.1	£5.0	£14.0	£1.2	£0.4	£1.3	£2.3	£0.3	£0.2	£1.0	£1.4	£0.3	£2.3	£0.3	£0.5	£0.2	£0.2	£0.0	£0.1	**£42.4**	7.5%	£3.2	**£45.6**
Cheltenham	Lidl, Swindon Road	£2.7	£2.4	£0.4	£1.0	£0.1	£0.1	£0.1	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£7.4**	7.3%	£0.5	**£8.0**
Cheltenham	Co-op, Wymans Brooks	£0.1	£1.7	£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	£0.0	£0.0	£0.0	£0.0	**£1.9**	4.4%	£0.1	**£2.0**
Cheltenham	Aldi, Tewkesbury Road	£1.8	£5.8	£0.2	£0.5	£0.9	£0.1	£0.3	£0.1	£0.2	£0.0	£0.1	£0.7	£0.2	£1.3	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	**£12.3**	5.3%	£0.7	**£13.0**
Cheltenham	Asda, Hatherley Lane	£1.6	£7.6	£1.2	£10.7	£0.9	£0.1	£0.1	£1.1	£0.2	£0.3	£1.1	£2.8	£0.2	£1.4	£0.2	£0.4	£0.0	£0.5	£0.1	£0.1	**£30.7**	7.2%	£2.2	**£32.9**
Cheltenham	Tesco, Collets Drive	£6.2	£22.1	£2.1	£7.7	£2.1	£0.5	£1.0	£1.4	£0.2	£0.1	£0.3	£0.8	£0.1	£2.6	£0.4	£0.2	£0.1	£0.1	£0.1	£0.1	**£48.1**	6.5%	£3.1	**£51.2**
Cheltenham	Marks & Spencer, Tewkesbury Road	£0.3	£0.5	£0.1	£0.2	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£0.1	£0.2	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£2.3**	8.0%	£0.2	**£2.5**
Cheltenham	Lidl, Tewkesbury Road	£1.2	£3.4	£0.3	£0.7	£0.3	£0.0	£0.1	£0.1	£0.0	£0.0	£0.2	£0.3	£0.1	£0.9	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	**£7.8**	4.4%	£0.3	**£8.2**
Cheltenham	Sainsburys, Tewkesbury Road	£4.6	£13.0	£1.2	£3.2	£3.6	£0.3	£1.2	£0.7	£0.2	£0.1	£0.6	£1.9	£0.5	£7.2	£0.7	£0.2	£0.0	£0.3	£0.1	£0.0	**£39.7**	9.5%	£3.8	**£43.4**
Cheltenham	Sainsburys, Oakley	£20.5	£0.9	£2.5	£0.8	£0.9	£0.2	£1.2	£1.5	£0.0	£0.0	£0.2	£0.1	£0.0	£0.3	£0.2	£0.2	£0.1	£0.0	£0.0	£0.0	**£29.8**	4.5%	£1.3	**£31.2**
Cheltenham	Co-op, London Road	£0.9	£0.1	£0.3	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.6**	7.3%	£0.1	**£1.7**
Cheltenham	Co-op, Leckhampton Road	£0.1	£0.1	£1.2	£0.2	£0.0	£0.0	£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	**£2.6**	10.3%	£0.3	**£2.8**
Cheltenham	Co-op, Charlton Kings	£0.1	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.1**	5.5%	£0.1	**£1.2**
Cheltenham	Sainsburys Local, Cirencester Road	£0.3	£0.1	£1.2	£0.1	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	**£2.6**	8.8%	£0.2	**£2.8**
Cheltenham	Lidl, Cirencester Road	£1.9	£0.2	£3.0	£0.3	£0.1	£0.1	£0.2	£2.3	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	**£8.6**	5.2%	£0.4	**£9.1**
Cheltenham	Other stores in Cheltenham	£8.7	£8.9	£3.0	£7.3	£1.2	£0.4	£0.4	£2.0	£0.3	£0.2	£0.9	£0.9	£0.2	£1.6	£0.4	£0.4	£0.3	£0.1	£0.1	£0.1	**£37.3**	15.0%	£5.6	**£42.9**
Tewkesbury	Tesco, Tewkesbury town centre	£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	£4.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	**£4.8**	11.2%	£0.5	**£5.3**
Tewkesbury	Aldi, Gloucester Road	£0.0	£0.1	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.4	£11.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	**£12.7**	5.9%	£0.8	**£13.5**
Tewkesbury	Other stores in Tewkesbury town centre	£0.0	£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	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.7**	16.3%	£0.3	**£2.0**
Tewkesbury	Morrisons, Ashchurch Road	£0.1	£0.2	£0.0	£0.1	£0.4	£0.0	£0.2	£0.0	£0.1	£0.1	£0.2	£0.2	£0.4	£21.0	£0.8	£0.1	£0.0	£0.1	£0.1	£0.0	**£24.1**	13.8%	£3.3	**£27.5**
Tewkesbury	Co-op, Northway	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.8**	9.1%	£0.2	**£2.0**
Tewkesbury	Other stores in Tewkesbury / Ashchurch	£0.1	£0.1	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.5	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	**£5.7**	14.0%	£0.8	**£6.5**
Bishops Cleeve	Co-op, The Green	£0.0	£0.0	£0.0	£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	£0.0	**£0.8**	4.5%	£0.0	**£0.8**
Bishops Cleeve	Tesco, Church Road	£4.3	£1.3	£0.2	£0.3	£20.4	£0.0	£2.2	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£3.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	**£33.4**	3.3%	£1.1	**£34.5**
Bishops Cleeve	Lidl, Evesham Road	£0.8	£0.4	£0.1	£0.1	£5.9	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	**£9.6**	2.7%	£0.3	**£9.8**
Bishops Cleeve	Other stores in Bichops Cleeve	£0.1	£0.1	£0.0	£0.1	£1.2	£0.0	£0.2	£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	**£1.8**	16.6%	£0.3	**£2.1**
Winchcombe	Morrisons Daily, North Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**	119.8%	£0.0	**£0.0**
Winchcombe	Morrisons Daily, North Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.3**	52.7%	£0.1	**£0.4**
Winchcombe	Co-op, Greet Road	£0.1	£0.1	£0.0	£0.0	£0.1	£0.0	£3.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	**£3.9**	14.2%	£0.5	**£4.4**
Winchcombe	Other stores in Winchcombe	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	**£2.0**	73.3%	£1.5	**£3.5**
Brockworth	Tesco, Gloucester Business Park	£0.8	£0.6	£1.1	£1.1	£0.3	£0.2	£0.1	£1.8	£1.7	£0.9	£36.9	£5.2	£0.3	£0.4	£0.1	£1.7	£0.2	£0.4	£0.1	£0.3	**£54.2**	10.5%	£5.7	**£59.9**
Brockworth	Co-op, Court Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.5**	9.2%	£0.1	**£1.6**
Brockworth	Morrisons Daily, Court Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**	24.0%	£0.0	**£0.0**
Brockworth	Morrisons Daily, Court Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.2**	6.6%	£0.0	**£0.2**
Brockworth	Co-op, Abbotswood Shopping Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£1.2**	10.6%	£0.1	**£1.3**
Brockworth	Other stores in Brockworth	£0.1	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£1.2	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	**£2.2**	28.7%	£0.6	**£2.8**
Churchdown	Other stores in Churchdown	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£2.2**	3.8%	£0.1	**£2.3**
Elsewhere	Other Stores Outside SLP area	£10.4	£11.9	£6.9	£15.6	£9.5	£69.0	£7.9	£9.4	£9.6	£11.2	£16.0	£13.1	£22.0	£39.9	£189.2	£188.3	£97.6	£55.1	£92.3	£59.3	**£934.5**			
Online	Online	£14.1	£15.6	£10.4	£16.2	£11.3	£16.4	£7.0	£6.6	£13.1	£14.2	£30.2	£21.3	£8.5	£26.7	£41.6	£39.9	£21.5	£13.9	£21.0	£13.0	**£362.7**			
Total	**Total**	**£93.9**	**£116.6**	**£53.2**	**£109.4**	**£63.5**	**£89.1**	**£29.6**	**£37.0**	**£108.9**	**£94.8**	**£211.0**	**£123.5**	**£50.0**	**£141.5**	**£237.1**	**£258.5**	**£121.8**	**£87.6**	**£119.1**	**£83.9**	**£2,230.0**			

Notes: turnover calculated by applying market shares (Table 4) to available expenditure (Table 3a).

TABLE 6: COMPARISON GOODS SHOPPING MARKET SHARE, BY ZONE

LOCATION	LOCAL AUTHORITY	ZONE																			
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13
Gloucester city centre	Gloucester	0.2%	0.4%	0.2%	0.3%	0.2%	0.1%	0.1%	0.2%	11.7%	5.4%	6.9%	5.4%	3.7%	0.4%	0.0%	1.7%	0.1%	4.2%	1.7%	1.2%
Quedgeley	Gloucester	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	1.8%	6.7%	1.8%	1.1%	0.7%	0.1%	0.0%	1.5%	0.0%	0.6%	0.2%	1.2%
Abbeydale	Gloucester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%	1.0%	0.2%	0.4%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%
Gloucester Quays / Peel Centre	Gloucester	0.6%	0.8%	0.5%	0.7%	1.3%	0.2%	0.3%	0.5%	7.1%	5.5%	5.1%	4.3%	3.9%	1.1%	0.2%	2.1%	0.2%	3.3%	1.7%	1.9%
St Oswald's Retail Park	Gloucester	0.5%	0.9%	0.5%	0.5%	0.3%	0.1%	0.2%	0.6%	8.7%	4.8%	5.8%	6.8%	4.7%	1.0%	0.0%	1.3%	0.1%	5.4%	2.5%	1.4%
Eastern Avenue	Gloucester	0.1%	0.4%	0.2%	0.2%	0.2%	0.0%	0.0%	0.4%	4.1%	2.1%	7.5%	4.6%	1.7%	0.3%	0.0%	0.7%	0.1%	1.1%	0.4%	0.6%
Other Gloucester	Gloucester	0.1%	0.3%	0.2%	0.2%	0.2%	0.1%	0.1%	0.2%	2.6%	5.4%	3.4%	2.5%	2.0%	0.3%	0.0%	1.7%	0.1%	1.1%	0.7%	1.7%
Cheltenham town centre	Cheltenham	18.7%	12.6%	19.7%	18.9%	11.0%	4.7%	10.5%	13.6%	1.9%	1.8%	3.9%	5.5%	3.2%	6.1%	2.5%	2.6%	2.6%	2.6%	0.5%	0.5%
Coronation Square	Cheltenham	0.1%	0.8%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bath Road	Cheltenham	0.5%	0.2%	1.1%	0.8%	0.1%	0.0%	0.1%	0.6%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tewkesbury Road / Kingsditch	Cheltenham	9.4%	17.7%	5.9%	7.1%	15.0%	1.6%	6.2%	5.3%	0.8%	0.9%	1.7%	3.7%	2.1%	9.1%	1.5%	0.7%	0.4%	1.0%	0.3%	0.3%
Other Cheltenham	Cheltenham	10.3%	11.3%	10.9%	11.8%	7.9%	1.1%	5.2%	10.5%	0.9%	0.9%	2.4%	4.0%	1.1%	3.6%	0.7%	0.8%	0.7%	0.8%	0.2%	0.4%
Tewkesbury town centre	Tewkesbury	0.1%	0.1%	0.0%	0.1%	0.4%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.2%	0.4%	5.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Tewkesbury / Ashchurch	Tewkesbury	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	1.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishops Cleeve	Tewkesbury	0.6%	0.3%	0.2%	0.1%	4.7%	0.0%	2.0%	0.3%	0.0%	0.0%	0.0%	0.1%	0.1%	0.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Winchcombe	Tewkesbury	0.1%	0.0%	0.1%	0.0%	0.2%	0.1%	3.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brockworth	Tewkesbury	0.1%	0.1%	0.3%	0.2%	0.0%	0.0%	0.0%	0.4%	0.1%	0.6%	0.9%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%
Churchdown	Tewkesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.7%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Other Comparison Stores Within SLP area		5.7%	4.1%	6.5%	4.8%	4.5%	16.1%	10.8%	8.7%	6.0%	8.9%	6.0%	7.0%	13.1%	7.2%	29.7%	24.3%	28.4%	16.1%	20.5%	15.6%
Other Stores Outside of SLP area		11.9%	10.9%	13.7%	17.0%	11.6%	25.6%	16.0%	12.7%	13.0%	16.5%	12.6%	14.1%	23.3%	22.1%	22.1%	19.5%	21.3%	21.5%	27.7%	31.4%
Online spending		40.8%	38.9%	39.9%	37.2%	42.2%	50.3%	45.2%	45.4%	40.4%	40.1%	40.6%	39.3%	39.2%	40.7%	42.7%	42.9%	46.1%	42.0%	43.4%	43.6%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: market shares calculated using spending data provided by Experian.

TABLE 7a: COMPARISON GOODS TURNOVER, BY ZONE, 2025

LOCATION	LOCAL AUTHORITY	ZONE																				STUDY AREA	INFLOW	INFLOW	TOTAL
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	TURNOVER (£m)	(%)	(£m)	(£m)
Gloucester city centre	Gloucester	£0.3	£0.7	£0.2	£0.4	£0.2	£0.1	£0.1	£0.1	£17.2	£7.6	£21.0	£10.2	£2.8	£0.9	£0.1	£6.4	£0.2	£5.0	£2.8	£1.5	£77.8	12.6%	£9.8	£87.7
Quedgeley	Gloucester	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£2.6	£9.4	£5.4	£2.2	£0.5	£0.2	£0.0	£6.0	£0.1	£0.7	£0.4	£1.5	£29.4	6.6%	£1.9	£31.4
Abbeydale	Gloucester	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.3	£3.0	£0.4	£0.3	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£5.7	10.8%	£0.6	£6.3
Gloucester Quays / Peel Centre	Gloucester	£0.9	£1.3	£0.4	£1.1	£1.3	£0.3	£0.1	£0.3	£10.5	£7.7	£15.3	£8.1	£2.9	£2.3	£0.6	£8.3	£0.3	£4.0	£2.7	£2.3	£70.6	36.8%	£26.0	£96.6
St Oswald's Retail Park	Gloucester	£0.7	£1.4	£0.5	£0.8	£0.3	£0.1	£0.1	£0.4	£12.9	£6.8	£17.5	£12.8	£3.5	£2.1	£0.1	£4.9	£0.2	£6.5	£4.2	£1.7	£77.2	13.7%	£10.6	£87.8
Eastern Avenue	Gloucester	£0.2	£0.6	£0.2	£0.3	£0.2	£0.0	£0.0	£0.2	£6.1	£3.0	£22.8	£8.5	£1.2	£0.6	£0.1	£2.7	£0.2	£1.4	£0.7	£0.7	£49.6	9.0%	£4.5	£54.0
Other Gloucester	Gloucester	£0.2	£0.4	£0.1	£0.4	£0.2	£0.1	£0.0	£0.1	£3.9	£7.5	£10.3	£4.7	£1.5	£0.7	£0.2	£6.7	£0.1	£1.3	£1.1	£2.1	£41.8	17.1%	£7.1	£48.9
Cheltenham town centre	Cheltenham	£27.0	£20.6	£16.7	£31.6	£10.6	£6.2	£4.8	£8.1	£2.9	£2.5	£11.9	£10.4	£2.3	£13.0	£8.8	£10.1	£4.8	£3.1	£0.8	£0.7	£196.7	29.0%	£57.0	£253.7
Coronation Square	Cheltenham	£0.1	£1.3	£0.0	£0.1	£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	£1.8	4.5%	£0.1	£1.9
Bath Road	Cheltenham	£0.8	£0.3	£0.9	£1.3	£0.1	£0.0	£0.1	£0.4	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	13.9%	£0.6	£4.9
Tewkesbury Road / Kingsditch	Cheltenham	£13.6	£29.0	£5.0	£11.8	£14.5	£2.1	£2.8	£3.2	£1.2	£1.2	£5.2	£6.9	£1.6	£19.5	£5.2	£2.6	£0.7	£1.2	£0.5	£0.3	£128.1	14.4%	£18.5	£146.6
Other Cheltenham	Cheltenham	£14.8	£18.5	£9.3	£19.7	£7.6	£1.4	£2.4	£6.3	£1.3	£1.3	£7.2	£7.5	£0.8	£7.6	£2.6	£3.0	£1.3	£0.9	£0.4	£0.5	£114.4	18.9%	£21.6	£136.0
Tewkesbury town centre	Tewkesbury	£0.1	£0.2	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.1	£0.1	£0.2	£0.3	£0.3	£10.9	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£13.3	24.3%	£3.2	£16.6
Other Tewkesbury / Ashchurch	Tewkesbury	£0.1	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.2	£0.1	£3.9	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£5.7	142.1%	£8.0	£13.7
Bishops Cleeve	Tewkesbury	£0.9	£0.5	£0.2	£0.2	£4.6	£0.0	£0.9	£0.2	£0.0	£0.0	£0.1	£0.1	£0.0	£1.7	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£10.0	16.5%	£1.6	£11.7
Winchcombe	Tewkesbury	£0.2	£0.1	£0.0	£0.1	£0.1	£0.1	£1.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	61.6%	£1.6	£4.3
Brockworth	Tewkesbury	£0.1	£0.2	£0.3	£0.3	£0.0	£0.0	£0.0	£0.3	£0.1	£0.9	£2.7	£0.4	£0.0	£0.1	£0.0	£0.3	£0.0	£0.0	£0.0	£0.1	£5.8	14.8%	£0.9	£6.7
Churchdown	Tewkesbury	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.7	£1.2	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.6	7.6%	£0.2	£2.8
Other Comparison Stores Within SLP area		£8.3	£6.8	£5.5	£8.1	£4.4	£21.1	£4.9	£5.1	£8.8	£12.5	£18.0	£13.1	£9.7	£15.4	£103.2	£94.3	£52.7	£19.5	£33.9	£19.1				
Other Stores Outside of SLP area		£17.2	£17.9	£11.6	£28.3	£11.2	£33.7	£7.3	£7.5	£19.1	£23.1	£38.1	£26.5	£17.3	£47.2	£76.7	£75.6	£39.5	£25.9	£45.8	£38.3				
Online spending		£59.0	£63.7	£33.9	£62.1	£40.7	£66.2	£20.6	£27.0	£59.6	£56.3	£123.0	£73.7	£29.1	£86.9	£148.3	£166.8	£85.7	£50.6	£71.7	£53.2				
TOTAL		£144.4	£163.8	£85.0	£166.8	£96.6	£131.6	£45.6	£59.5	£147.4	£140.5	£302.8	£187.5	£74.1	£213.3	£347.4	£388.4	£185.9	£120.5	£165.1	£121.9				

Notes: turnover calculated by applying market shares (Table 6) to available expenditure (Table 3b).

TABLE 8: CLASS E(b) FOOD & BEVERAGE MARKET SHARE, BY ZONE

LOCATION	LOCAL AUTHORITY	ZONE																			
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13
Gloucester city centre	Gloucester	0.3%	0.5%	0.1%	0.2%	0.2%	0.0%	0.0%	0.2%	6.8%	3.1%	4.8%	3.2%	1.6%	0.3%	0.0%	0.7%	0.1%	2.3%	0.8%	0.5%
Quedgeley	Gloucester	0.1%	0.3%	0.0%	0.2%	0.2%	0.0%	0.0%	0.2%	1.7%	8.8%	2.4%	1.2%	0.9%	0.3%	0.0%	1.2%	0.1%	1.1%	0.4%	1.8%
Abbeydale	Gloucester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gloucester Quays / Peel Centre	Gloucester	0.9%	1.5%	0.6%	0.8%	1.1%	0.3%	0.4%	0.9%	12.2%	10.4%	8.0%	7.4%	5.5%	1.1%	0.3%	2.4%	0.3%	5.4%	2.1%	1.8%
St Oswald's Retail Park	Gloucester	0.7%	1.1%	0.5%	0.7%	0.7%	0.1%	0.2%	0.4%	12.8%	5.9%	5.2%	6.0%	3.8%	0.8%	0.1%	1.2%	0.2%	3.4%	1.2%	0.8%
Eastern Avenue	Gloucester	0.1%	0.3%	0.1%	0.1%	0.2%	0.1%	0.0%	0.2%	1.8%	1.2%	3.5%	1.8%	0.5%	0.2%	0.1%	0.3%	0.1%	0.7%	0.2%	0.2%
Other Gloucester	Gloucester	1.3%	1.4%	1.5%	1.3%	1.3%	0.6%	0.8%	1.3%	7.4%	7.4%	9.2%	6.0%	1.9%	1.2%	0.7%	2.5%	0.8%	1.7%	1.1%	2.4%
Cheltenham town centre	Cheltenham	18.1%	16.4%	17.1%	23.0%	12.0%	2.5%	6.7%	13.3%	3.4%	2.8%	5.2%	8.0%	4.3%	6.6%	2.3%	2.4%	2.0%	3.2%	1.1%	1.0%
Coronation Square	Cheltenham	0.2%	0.9%	0.1%	0.2%	0.2%	0.0%	0.3%	0.1%	0.1%	0.1%	0.2%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Bath Road	Cheltenham	4.2%	2.4%	10.7%	5.8%	1.9%	0.4%	1.6%	6.6%	0.6%	0.5%	1.0%	1.3%	0.3%	0.8%	0.3%	0.5%	0.2%	0.4%	0.2%	0.1%
Tewkesbury Road / Kingsditch	Cheltenham	1.7%	3.9%	0.7%	0.9%	2.6%	0.2%	0.9%	0.6%	0.3%	0.3%	0.4%	0.7%	0.2%	1.2%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%
Other Cheltenham	Cheltenham	18.7%	18.8%	13.7%	16.0%	12.1%	1.7%	6.8%	12.3%	3.3%	2.6%	4.7%	6.2%	2.4%	4.8%	1.6%	2.3%	2.1%	1.7%	0.9%	0.8%
Tewkesbury town centre	Tewkesbury	0.3%	0.5%	0.1%	0.3%	0.9%	0.0%	0.5%	0.3%	0.2%	0.2%	0.3%	0.6%	1.5%	10.0%	0.3%	0.1%	0.0%	0.1%	0.1%	0.1%
Other Tewkesbury / Ashchurch	Tewkesbury	0.4%	0.4%	0.5%	0.2%	1.1%	0.1%	1.3%	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%	1.4%	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%
Bishops Cleeve	Tewkesbury	1.1%	1.3%	0.3%	0.3%	14.0%	0.1%	1.3%	0.2%	0.1%	0.2%	0.1%	0.2%	0.1%	0.8%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%
Winchcombe	Tewkesbury	0.7%	0.3%	0.2%	0.3%	1.2%	0.5%	13.7%	0.3%	0.0%	0.0%	0.1%	0.1%	0.1%	0.8%	0.7%	0.0%	0.1%	0.0%	0.0%	0.1%
Brockworth	Tewkesbury	0.6%	1.2%	0.5%	0.8%	0.5%	0.1%	0.1%	1.1%	1.2%	1.2%	4.6%	1.3%	0.4%	0.2%	0.0%	0.5%	0.2%	0.3%	0.2%	0.2%
Churchdown	Tewkesbury	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Food & Beverage Facilities within SLP area		4.5%	5.3%	5.2%	4.3%	6.0%	30.4%	10.0%	12.3%	8.2%	12.5%	8.1%	10.8%	22.6%	11.4%	32.9%	32.1%	38.3%	23.6%	29.7%	33.9%
Other Food & Beverage Facilities Outside of SLP area		38.8%	34.5%	41.9%	38.1%	35.6%	56.7%	50.1%	44.1%	31.2%	32.8%	32.6%	34.2%	46.9%	49.5%	53.6%	46.5%	48.8%	48.1%	55.3%	48.3%
Online spending		7.1%	9.0%	6.1%	6.5%	8.2%	6.2%	5.3%	5.4%	8.3%	9.5%	8.5%	9.1%	6.8%	8.6%	6.5%	6.9%	6.6%	7.5%	6.6%	8.0%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: market shares calculated using spending data provided by Experian.

TABLE 9a: CLASS E(b) FOOD & BEVERAGE TURNOVER, BY ZONE, 2025

LOCATION	LOCAL AUTHORITY	ZONE																				STUDY AREA	INFLOW	INFLOW	TOTAL
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	TURNOVER (£m)	(%)	(£m)	(£m)
Gloucester city centre	Gloucester	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£1.8	£0.9	£3.0	£1.3	£0.2	£0.1	£0.0	£0.6	£0.0	£0.5	£0.3	£0.1	£9.4	23.4%	£2.2	£11.6
Quedgeley	Gloucester	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.4	£2.5	£1.5	£0.5	£0.1	£0.1	£0.0	£1.0	£0.0	£0.3	£0.1	£0.4	£7.4	69.3%	£5.2	£12.6
Abbeydale	Gloucester	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	20.9%	£0.1	£0.6
Gloucester Quays / Peel Centre	Gloucester	£0.3	£0.5	£0.1	£0.4	£0.2	£0.1	£0.0	£0.1	£3.2	£2.9	£5.0	£3.1	£0.8	£0.5	£0.2	£2.0	£0.1	£1.3	£0.7	£0.4	£22.0	42.8%	£9.4	£31.4
St Oswald's Retail Park	Gloucester	£0.2	£0.3	£0.1	£0.3	£0.1	£0.0	£0.0	£0.1	£3.4	£1.7	£3.3	£2.5	£0.6	£0.3	£0.1	£1.0	£0.1	£0.8	£0.4	£0.2	£15.4	43.5%	£6.7	£22.2
Eastern Avenue	Gloucester	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.5	£0.3	£2.2	£0.8	£0.1	£0.1	£0.0	£0.2	£0.0	£0.2	£0.1	£0.0	£4.9	16.3%	£0.8	£5.7
Other Gloucester	Gloucester	£0.5	£0.5	£0.3	£0.5	£0.3	£0.2	£0.1	£0.2	£1.9	£2.1	£5.8	£2.5	£0.3	£0.5	£0.4	£2.1	£0.3	£0.4	£0.4	£0.6	£19.8	545.4%	£108.1	£127.9
Cheltenham town centre	Cheltenham	£6.2	£5.4	£3.7	£9.6	£2.5	£0.7	£0.7	£1.9	£0.9	£0.8	£3.3	£3.3	£0.7	£2.9	£1.5	£2.0	£0.8	£0.8	£0.4	£0.2	£48.2	53.1%	£25.6	£73.8
Coronation Square	Cheltenham	£0.1	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	55.3%	£0.6	£1.6
Bath Road	Cheltenham	£1.5	£0.8	£2.3	£2.4	£0.4	£0.1	£0.2	£1.0	£0.2	£0.1	£0.7	£0.5	£0.0	£0.4	£0.2	£0.4	£0.1	£0.1	£0.0	£0.0	£11.3	19.7%	£2.2	£13.6
Tewkesbury Road / Kingsditch	Cheltenham	£0.6	£1.3	£0.2	£0.4	£0.5	£0.0	£0.1	£0.1	£0.1	£0.1	£0.3	£0.3	£0.0	£0.5	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£4.7	21.5%	£1.0	£5.7
Other Cheltenham	Cheltenham	£6.4	£6.2	£2.9	£6.7	£2.5	£0.5	£0.7	£1.8	£0.9	£0.7	£2.9	£2.6	£0.4	£2.1	£1.0	£1.9	£0.9	£0.4	£0.3	£0.2	£42.0	58.7%	£24.7	£66.7
Tewkesbury town centre	Tewkesbury	£0.1	£0.2	£0.0	£0.1	£0.2	£0.0	£0.1	£0.0	£0.1	£0.1	£0.2	£0.2	£0.2	£4.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£6.2	46.1%	£2.9	£9.1
Other Tewkesbury / Ashchurch	Tewkesbury	£0.2	£0.1	£0.1	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.6	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	59.5%	£1.2	£3.2
Bishops Cleeve	Tewkesbury	£0.4	£0.4	£0.1	£0.1	£2.9	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£4.9	31.5%	£1.5	£6.4
Winchcombe	Tewkesbury	£0.2	£0.1	£0.0	£0.1	£0.3	£0.1	£1.4	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.3	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4	99.4%	£3.4	£6.8
Brockworth	Tewkesbury	£0.2	£0.4	£0.1	£0.3	£0.1	£0.0	£0.0	£0.2	£0.3	£0.3	£2.9	£0.5	£0.1	£0.1	£0.0	£0.4	£0.1	£0.1	£0.1	£0.1	£6.3	27.0%	£1.7	£8.0
Churchdown	Tewkesbury	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	10.3%	£0.1	£1.0
Other Food & Beverage Facilities within SLP area		£1.5	£1.7	£1.1	£1.8	£1.2	£8.5	£1.0	£1.8	£2.2	£3.5	£5.1	£4.5	£3.5	£5.1	£20.5	£26.6	£15.9	£5.5	£9.6	£8.3				
Other Food & Beverage Facilities Outside of SLP area		£13.3	£11.4	£9.0	£15.9	£7.4	£15.9	£5.2	£6.3	£8.2	£9.2	£20.5	£14.2	£7.2	£21.9	£33.4	£38.5	£20.2	£11.2	£18.0	£11.8				
Online spending		£2.4	£3.0	£1.3	£2.7	£1.7	£1.7	£0.6	£0.8	£2.2	£2.7	£5.3	£3.8	£1.0	£3.8	£4.1	£5.7	£2.7	£1.8	£2.2	£2.0				
TOTAL		**£34.3**	**£33.1**	**£21.4**	**£41.8**	**£20.8**	**£28.1**	**£10.4**	**£14.4**	**£26.3**	**£28.0**	**£63.0**	**£41.6**	**£15.4**	**£44.3**	**£62.4**	**£82.8**	**£41.4**	**£23.3**	**£32.5**	**£24.4**				

Notes: turnover calculated by applying market shares (Table 8) to available expenditure (Table 3c).

TABLE 10: SUI GENERIS FOOD & BEVERAGE MARKET SHARE, BY ZONE

LOCATION	LOCAL AUTHORITY	ZONE																			
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13
Gloucester city centre	Gloucester	0.2%	0.4%	0.1%	0.3%	0.1%	0.0%	0.0%	0.1%	5.4%	1.9%	2.5%	2.0%	1.0%	0.2%	0.0%	0.5%	0.1%	0.9%	0.4%	0.4%
Quedgeley	Gloucester	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	8.1%	0.7%	0.3%	0.3%	0.1%	0.0%	0.4%	0.1%	0.1%	0.0%	0.2%
Abbeydale	Gloucester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%	2.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gloucester Quays / Peel Centre	Gloucester	0.1%	0.2%	0.1%	0.1%	0.1%	0.0%	0.1%	0.1%	5.2%	1.3%	1.4%	0.8%	0.7%	0.1%	0.1%	0.4%	0.1%	0.8%	0.3%	0.7%
St Oswald's Retail Park	Gloucester	0.6%	0.7%	0.4%	0.7%	0.4%	0.1%	0.3%	0.6%	13.7%	5.1%	4.6%	8.8%	7.2%	1.0%	0.1%	0.9%	0.2%	7.0%	3.4%	0.7%
Eastern Avenue	Gloucester	0.2%	0.5%	0.3%	0.3%	0.2%	0.2%	0.1%	0.8%	4.6%	1.6%	8.6%	4.1%	1.3%	0.3%	0.1%	0.5%	0.1%	1.4%	0.6%	0.2%
Other Gloucester	Gloucester	0.8%	1.0%	0.5%	0.8%	0.5%	0.4%	0.2%	1.1%	9.9%	17.2%	16.1%	12.4%	2.5%	0.6%	0.1%	3.4%	0.5%	1.8%	0.9%	4.5%
Cheltenham town centre	Cheltenham	11.5%	7.4%	9.2%	11.8%	4.2%	1.0%	2.2%	5.6%	1.8%	1.0%	2.0%	2.8%	1.4%	1.7%	0.6%	0.6%	0.7%	1.1%	0.4%	0.3%
Coronation Square	Cheltenham	0.2%	1.4%	0.1%	0.2%	0.2%	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%
Bath Road	Cheltenham	3.3%	2.6%	9.9%	5.2%	1.2%	0.4%	0.5%	5.0%	0.5%	0.4%	0.8%	1.0%	0.4%	0.4%	0.1%	0.3%	0.2%	0.3%	0.1%	0.1%
Tewkesbury Road / Kingsditch	Cheltenham	4.4%	10.2%	2.3%	3.0%	7.2%	0.8%	3.5%	2.5%	0.4%	0.5%	0.9%	2.1%	1.1%	3.3%	0.4%	0.3%	0.1%	0.7%	0.3%	0.1%
Other Cheltenham	Cheltenham	31.1%	29.6%	23.5%	31.4%	15.8%	2.1%	7.6%	26.1%	4.8%	3.4%	5.5%	7.9%	2.8%	4.1%	1.6%	1.9%	1.9%	2.0%	0.7%	0.9%
Tewkesbury town centre	Tewkesbury	0.5%	0.9%	0.6%	0.7%	1.5%	0.1%	0.4%	0.4%	0.3%	0.3%	0.4%	0.9%	1.8%	13.7%	0.4%	0.2%	0.0%	0.2%	0.1%	0.1%
Other Tewkesbury / Ashchurch	Tewkesbury	1.1%	1.7%	0.7%	1.0%	4.7%	0.4%	3.8%	0.6%	0.3%	0.5%	0.6%	0.9%	1.1%	12.9%	1.8%	0.2%	0.1%	0.2%	0.1%	0.1%
Bishops Cleeve	Tewkesbury	1.8%	1.6%	0.5%	0.6%	22.7%	0.1%	2.3%	0.3%	0.1%	0.2%	0.2%	0.3%	0.1%	0.6%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%
Winchcombe	Tewkesbury	1.6%	0.6%	0.7%	0.8%	2.6%	1.8%	31.6%	1.5%	0.1%	0.1%	0.1%	0.2%	0.2%	1.1%	1.2%	0.1%	0.1%	0.0%	0.0%	0.0%
Brockworth	Tewkesbury	0.2%	0.2%	0.2%	0.4%	0.2%	0.1%	0.0%	0.9%	0.5%	0.8%	3.7%	0.7%	0.3%	0.1%	0.0%	0.2%	0.1%	0.2%	0.1%	0.1%
Churchdown	Tewkesbury	0.2%	0.5%	0.1%	0.2%	0.1%	0.0%	0.2%	0.1%	0.3%	0.2%	0.8%	6.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Other Food & Beverage Facilities within SLP area		6.2%	4.5%	12.6%	4.6%	4.8%	38.4%	10.0%	15.7%	9.1%	16.3%	8.8%	9.9%	26.2%	15.2%	43.7%	44.2%	43.0%	34.0%	39.5%	39.5%
Other Food & Beverage Facilities Outside of SLP area		27.8%	24.1%	31.6%	29.9%	21.7%	50.1%	32.1%	33.2%	27.6%	25.6%	27.3%	27.1%	45.5%	33.2%	39.9%	35.8%	42.0%	40.4%	46.0%	40.6%
Online spending		8.1%	11.9%	6.4%	8.0%	11.9%	4.0%	4.8%	5.2%	14.4%	15.2%	13.1%	11.4%	6.1%	11.2%	9.9%	10.0%	10.6%	8.5%	6.8%	11.4%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: market shares calculated using spending data provided by Experian.

TABLE 11a: SUI GENERIS FOOD & BEVERAGE TURNOVER, BY ZONE, 2025

LOCATION	LOCAL AUTHORITY	ZONE																				STUDY AREA	INFLOW	INFLOW	TOTAL
		1a	1b	1c	1d	2	3a	3b	4	5a	5b	5c	5d	6	7	8	9	10	11	12	13	TURNOVER (£m)	(%)	(£m)	(£m)
Gloucester city centre	Gloucester	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9	£0.6	£1.6	£0.8	£0.1	£0.1	£0.0	£0.4	£0.0	£0.2	£0.1	£0.1	£6.4	27.1%	£1.7	£8.2
Quedgeley	Gloucester	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.5	£0.4	£0.1	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£4.0	49.8%	£2.0	£5.9
Abbeydale	Gloucester	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£1.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	8.3%	£0.1	£1.8
Gloucester Quays / Peel Centre	Gloucester	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.4	£0.9	£0.3	£0.1	£0.1	£0.0	£0.3	£0.0	£0.2	£0.1	£0.2	£4.7	33.7%	£1.6	£6.2
St Oswald's Retail Park	Gloucester	£0.2	£0.3	£0.1	£0.3	£0.1	£0.0	£0.0	£0.1	£4.9	£1.6	£3.1	£3.6	£0.9	£0.4	£0.1	£0.7	£0.1	£1.6	£1.1	£0.2	£19.2	23.3%	£4.5	£23.7
Eastern Avenue	Gloucester	£0.1	£0.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.1	£1.6	£0.5	£5.7	£1.7	£0.2	£0.1	£0.0	£0.4	£0.1	£0.3	£0.2	£0.1	£11.5	19.6%	£2.3	£13.7
Other Gloucester	Gloucester	£0.3	£0.4	£0.1	£0.3	£0.1	£0.1	£0.0	£0.1	£3.5	£5.4	£10.7	£5.0	£0.3	£0.3	£0.1	£2.7	£0.2	£0.4	£0.3	£1.0	£31.5	20.7%	£6.5	£38.0
Cheltenham town centre	Cheltenham	£4.0	£2.8	£1.8	£5.0	£0.8	£0.2	£0.2	£0.7	£0.7	£0.3	£1.3	£1.1	£0.2	£0.7	£0.4	£0.5	£0.3	£0.3	£0.1	£0.1	£21.5	50.1%	£10.7	£32.2
Coronation Square	Cheltenham	£0.1	£0.5	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	19.6%	£0.2	£1.3
Bath Road	Cheltenham	£1.2	£1.0	£2.0	£2.2	£0.2	£0.1	£0.0	£0.6	£0.2	£0.1	£0.5	£0.4	£0.0	£0.2	£0.1	£0.2	£0.1	£0.1	£0.0	£0.0	£9.2	19.6%	£1.8	£11.0
Tewkesbury Road / Kingsditch	Cheltenham	£1.5	£3.9	£0.5	£1.3	£1.5	£0.2	£0.3	£0.3	£0.1	£0.2	£0.6	£0.8	£0.1	£1.4	£0.2	£0.3	£0.0	£0.1	£0.1	£0.0	£13.4	21.0%	£2.8	£16.3
Other Cheltenham	Cheltenham	£10.9	£11.3	£4.7	£13.2	£3.2	£0.5	£0.6	£3.1	£1.7	£1.1	£3.7	£3.2	£0.4	£1.7	£1.0	£1.5	£0.7	£0.5	£0.2	£0.2	£63.4	38.4%	£24.3	£87.8
Tewkesbury town centre	Tewkesbury	£0.2	£0.3	£0.1	£0.3	£0.3	£0.0	£0.0	£0.1	£0.1	£0.1	£0.3	£0.4	£0.2	£5.7	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£8.7	57.0%	£5.0	£13.6
Other Tewkesbury / Ashchurch	Tewkesbury	£0.4	£0.7	£0.1	£0.4	£1.0	£0.1	£0.3	£0.1	£0.1	£0.1	£0.4	£0.3	£0.1	£5.4	£1.1	£0.1	£0.0	£0.1	£0.0	£0.0	£11.0	43.7%	£4.8	£15.8
Bishops Cleeve	Tewkesbury	£0.6	£0.6	£0.1	£0.2	£4.6	£0.0	£0.2	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.3	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£7.3	21.9%	£1.6	£8.9
Winchcombe	Tewkesbury	£0.5	£0.2	£0.1	£0.3	£0.5	£0.4	£2.7	£0.2	£0.0	£0.0	£0.1	£0.1	£0.0	£0.5	£0.8	£0.1	£0.0	£0.0	£0.0	£0.0	£6.7	82.5%	£5.5	£12.2
Brockworth	Tewkesbury	£0.1	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.2	£0.2	£2.5	£0.3	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£4.1	25.5%	£1.0	£5.1
Churchdown	Tewkesbury	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.5	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	0.0%	£0.0	£3.7
Other Food & Beverage Facilities within SLP area		£2.2	£1.7	£2.5	£1.9	£1.0	£9.1	£0.9	£1.9	£3.2	£5.2	£5.9	£4.0	£3.5	£6.4	£28.0	£35.3	£16.5	£7.7	£12.2	£9.1				
Other Food & Beverage Facilities Outside of SLP area		£9.7	£9.2	£6.3	£12.5	£4.4	£11.9	£2.7	£3.9	£9.8	£8.1	£18.2	£11.0	£6.0	£13.9	£25.5	£28.5	£16.1	£9.1	£14.3	£9.4				
Online spending		£2.8	£4.5	£1.3	£3.4	£2.4	£1.0	£0.4	£0.6	£5.1	£4.8	£8.7	£4.6	£0.8	£4.7	£6.3	£8.0	£4.1	£1.9	£2.1	£2.6				
TOTAL		**£35.0**	**£38.2**	**£19.9**	**£42.0**	**£20.3**	**£23.8**	**£8.6**	**£11.8**	**£35.5**	**£31.6**	**£66.7**	**£40.8**	**£13.2**	**£41.9**	**£63.9**	**£79.7**	**£38.3**	**£22.6**	**£31.0**	**£23.0**				

Notes: turnover calculated by applying market shares (Table 10) to available expenditure (Table 3d).

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