

# South Gloucestershire Council TOWN CENTRES AND RETAIL STUDY



**TYM & PARTNERS**  
Planners and Development Economists

Final Report Volume 2: Market Share, Spending Patterns and  
Floorspace Tables

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## SECTION 1

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### Comparison Goods



## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 1 - Ward composition of Study Zones

Ward Name	Study Zone	Ward Name	Study Zone
Alveston	1	Horfield	10
Charfield	1	Filton	10
Severn	1	Bradley Stoke Baileys Court	11
Thornbury North	1	Bradley Stoke Bowsland	11
Thornbury South	1	Bradley Stoke Sherbourne	11
Kingswood	2	Stoke Gifford	11
Vale	2	Frome Vale	12
Wotton-under-Edge	2	Downend	12
Dodington	3	Rodway	13
Ladden Brook	3	Staple Hill	13
Yate Central	3	Hillfields	14
Yate North	3	St George East	14
Yate West	3	Kings Chase	15
Chipping Sodbury	4	Woodstock	15
Cotswold Edge	4	Brislington East	16
Almondsbury	5	Hanham	16
Patchway	5	Bitton	17
Pilning and Severn Beach	5	Longwell Green	17
Frampton Cotterell	6	Oldland Common	17
Westerleigh	6	Parkwall	17
Winterbourne	6	Keynsham East	18
Siston	7	Keynsham North	18
Boyd Valley	8	Keynsham South	18
Henbury	9	Saltford	18
Southmead	9		

**Notes:**

Ward boundaries are 2001 Census, which are the same as ST Wards and CAS Wards 2003.

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 2 - Population Projections: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	All Zones Total
Population 2006	24,049	10,356	31,942	10,029	17,838	19,972	16,772	7,705	21,289	22,555	31,362	22,229	16,695	24,651	21,424	21,449	25,852	19,718	<b>365,887</b>
Population 2009	23,962	10,513	31,733	9,934	18,195	20,445	17,525	7,920	22,243	23,377	31,544	22,729	16,913	25,755	22,067	22,110	25,611	20,303	<b>372,881</b>
Population 2011	23,904	10,616	31,594	9,871	18,429	20,754	18,009	8,060	22,855	23,909	31,664	23,056	17,058	26,465	22,486	22,539	25,450	20,684	<b>377,402</b>
Population 2016	23,592	10,713	31,201	9,787	22,104	24,234	19,351	9,656	24,344	24,762	32,048	23,717	17,062	28,188	23,131	23,445	24,922	21,492	<b>393,750</b>
Population 2021	23,432	10,801	34,208	9,781	23,023	26,654	26,374	10,594	25,702	25,951	31,884	24,727	17,372	29,761	23,578	24,466	27,872	22,301	<b>418,480</b>
Population 2026	24,458	10,908	37,344	9,837	23,348	29,228	32,432	10,586	26,957	27,191	31,980	25,797	17,836	31,215	24,116	25,543	30,969	23,177	<b>442,922</b>
<b>Change in population 2009 - 2011</b>																			
Numeric change	-58	103	-140	-64	234	309	484	140	613	532	121	327	144	709	418	429	-162	381	4,521
Percentage change	-0.2%	1.0%	-0.4%	-0.6%	1.3%	1.5%	2.9%	1.8%	2.9%	2.4%	0.4%	1.5%	0.9%	2.9%	2.0%	2.0%	-0.6%	1.9%	1.2%
<b>Change in population 2011 - 2016</b>																			
Numeric change	-313	97	-392	-84	3,675	3,480	1,342	1,597	1,488	853	383	661	5	1,723	646	906	-528	808	16,348
Percentage change	-1.3%	0.9%	-1.2%	-0.8%	19.9%	16.8%	7.5%	19.8%	6.5%	3.6%	1.2%	2.9%	0.0%	6.5%	2.9%	4.0%	-2.1%	3.9%	4.3%
<b>Change in population 2016 - 2021</b>																			
Numeric change	-159	88	3,006	-6	918	2,420	7,023	938	1,359	1,189	-164	1,010	309	1,573	446	1,020	2,950	808	24,730
Percentage change	-0.7%	0.8%	9.6%	-0.1%	4.2%	10.0%	36.3%	9.7%	5.6%	4.8%	-0.5%	4.3%	1.8%	5.6%	1.9%	4.4%	11.8%	3.8%	6.3%
<b>Change in population 2021 - 2026</b>																			
Numeric change	1,026	107	3,136	56	325	2,574	6,058	-8	1,255	1,240	96	1,070	465	1,453	538	1,077	3,097	876	24,442
Percentage change	4.4%	1.0%	9.2%	0.6%	1.4%	9.7%	23.0%	-0.1%	4.9%	4.8%	0.3%	4.3%	2.7%	4.9%	2.3%	4.4%	11.1%	3.9%	5.8%
<b>Change in population 2009 - 2026</b>																			
Numeric change	496	395	5,610	-97	5,153	8,783	14,907	2,666	4,715	3,814	436	3,068	923	5,459	2,049	3,433	5,357	2,873	70,041
Percentage change	2.1%	3.8%	17.6%	-1.0%	28.9%	44.0%	88.9%	34.6%	22.1%	16.9%	1.4%	13.8%	5.5%	22.1%	9.6%	16.0%	20.7%	14.6%	19.1%

#### NOTES:

(1) Population base data was sourced from ONS Mid-year Population Estimates 2006.

(2) The individual zone populations for 2011, 2016, 2021 and 2026 have been populated by South Gloucestershire Council using information available in relation to committed development and know locations for future growth and an assumed factor for decreasing household size. These figures match the higher growth scenario concurrent with the SOS Proposed Changes RSS housing targets.

(3) For areas outside of the South Gloucestershire boundary specific growth figures were provided by Gloucestershire County Council however standard district wide population projections (ONS 2006 Sub-national Population Projections) have been used for areas in Bristol and Bath and North East Somerset.



# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 3 - Comparison Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£
<b>2006</b>	3,192	3,205	3,126	3,309	3,048	3,215	3,392	3,166	2,719	3,010	3,394	3,049	3,039	2,948	3,053	3,057	3,163	3,208
<b>2009</b>	3,577	3,591	3,503	3,708	3,415	3,602	3,801	3,547	3,047	3,373	3,803	3,416	3,405	3,303	3,421	3,425	3,544	3,594
<b>2011</b>	3,707	3,722	3,630	3,843	3,540	3,734	3,939	3,677	3,158	3,495	3,941	3,541	3,529	3,423	3,545	3,550	3,673	3,725
<b>2016</b>	4,054	4,070	3,970	4,202	3,871	4,083	4,308	4,021	3,453	3,823	4,310	3,872	3,859	3,744	3,877	3,882	4,017	4,074
<b>2021</b>	5,386	5,408	5,275	5,584	5,143	5,425	5,724	5,343	4,588	5,079	5,727	5,145	5,128	4,975	5,152	5,159	5,338	5,413
<b>2026</b>	6,633	6,660	6,495	6,876	6,333	6,680	7,048	6,579	5,650	6,254	7,052	6,335	6,315	6,126	6,344	6,352	6,572	6,666

### NOTES:

- (1) Expenditure data derived from Mapinfo 2006 per capita annual comparison goods expenditure estimates, which we have obtained through our in-house GIS system.
- (2) The 2006 MapInfo expenditure data has been projected forward to the base year of the study (2009). To do this we use an actual growth rate in comparison spend of 4.91% between 2006 and 2008 (sourced from the Oxford Economics Retail Briefings Update, Revised Version March 2009) and then one year of forecast growth at 1.805% per annum, which is the mid-point forecast growth figure for the 2008-2016 period given by MapInfo and Experian. Source: MapInfo Retail Spending Outlook Revised Version, March 2009 and the Experian Retail Planner Briefing Note 6.1 February 2009 Changes - Table 3.
- (3) Expenditure for 2009 to 2016: Uses a growth rate of 1.805% per annum. This is derived from the mid-point forecast growth rate for 2008-2016 given by Mapinfo and Experian. Source: MapInfo, Retail Spending Outlook Revised Version March 2009 and Experian Retail Planner Briefing Note 6.1 February 2009 Changes, Table 3.
- (4) Expenditure growth for 2016-2021: Uses a growth rate of 5.85% per annum. This is derived from the mid-point medium term past trends in retail expenditure growth given by MapInfo and Experian. Source: MapInfo Brief 08/02, medium term past trend, Table 3 and Experian Retail Planner Briefing Note 6.1, medium term past trend, Table 3.2.
- (5) Expenditure growth for 2021-2026: Uses a growth rate of 4.25% per annum. Derived from the mid-point ultra long term past trends given by MapInfo and Experian. Source: MapInfo Brief 08/02, ultra long term past trend, Table 3 and Experian Retail Planner Briefing Note

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

Spreadsheet 4 - Total Comparison Goods Expenditure & Expenditure Growth: Scenario 2 (higher growth: SOS Proposed Changes RSS)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	All Zones Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total 2009 (including SFT)	85.70	37.75	111.15	36.83	62.14	73.65	66.61	28.09	67.76	78.84	119.96	77.65	57.59	85.07	75.49	75.73	90.77	72.98	1,303.78
Deduction for SFT in 2009 (based on survey)	9.70	4.27	12.57	4.17	7.03	8.33	7.54	3.18	7.67	8.92	13.57	8.78	6.52	9.62	8.54	8.57	10.27	8.26	147.49
<b>Total 2009 (excluding SFT)</b>	<b>76.01</b>	<b>33.48</b>	<b>98.58</b>	<b>32.67</b>	<b>55.11</b>	<b>65.32</b>	<b>59.07</b>	<b>24.92</b>	<b>60.10</b>	<b>69.92</b>	<b>106.39</b>	<b>68.87</b>	<b>51.08</b>	<b>75.45</b>	<b>66.95</b>	<b>67.17</b>	<b>80.50</b>	<b>64.72</b>	<b>1,156.29</b>
Total 2011 (including SFT)	88.61	39.51	114.69	37.93	65.23	77.49	70.94	29.63	72.17	83.57	124.80	81.64	60.20	90.60	79.72	80.02	93.48	77.06	1,367.29
Deduction for SFT in 2011 of 11.8%	10.46	4.66	13.53	4.48	7.70	9.14	8.37	3.50	8.52	9.86	14.73	9.63	7.10	10.69	9.41	9.44	11.03	9.09	161.34
<b>Total 2011 (excluding SFT)</b>	<b>78.15</b>	<b>34.85</b>	<b>101.16</b>	<b>33.45</b>	<b>57.53</b>	<b>68.34</b>	<b>62.57</b>	<b>26.14</b>	<b>63.65</b>	<b>73.71</b>	<b>110.08</b>	<b>72.00</b>	<b>53.10</b>	<b>79.91</b>	<b>70.31</b>	<b>70.57</b>	<b>82.45</b>	<b>67.96</b>	<b>1,205.95</b>
Total 2016 (including SFT)	95.63	43.60	123.87	41.13	85.56	98.95	83.36	38.82	84.06	94.65	138.13	91.84	65.85	105.53	89.68	91.02	100.11	87.56	1,559.35
Deduction for SFT in 2016 of 12.5%	11.95	5.45	15.48	5.14	10.70	12.37	10.42	4.85	10.51	11.83	17.27	11.48	8.23	13.19	11.21	11.38	12.51	10.94	194.92
<b>Total 2016 (excluding SFT)</b>	<b>83.68</b>	<b>38.15</b>	<b>108.38</b>	<b>35.99</b>	<b>74.87</b>	<b>86.58</b>	<b>72.94</b>	<b>33.97</b>	<b>73.55</b>	<b>82.82</b>	<b>120.87</b>	<b>80.36</b>	<b>57.62</b>	<b>92.34</b>	<b>78.47</b>	<b>79.64</b>	<b>87.59</b>	<b>76.61</b>	<b>1,364.43</b>
Total 2021 (including SFT)	126.22	58.42	180.45	54.62	118.42	144.61	150.96	56.60	117.93	131.81	182.61	127.23	89.09	148.05	121.47	126.21	148.77	120.72	2,204.17
Deduction for SFT in 2021 of 12.5%	15.78	7.30	22.56	6.83	14.80	18.08	18.87	7.07	14.74	16.48	22.83	15.90	11.14	18.51	15.18	15.78	18.60	15.09	275.52
<b>Total 2021 (excluding SFT)</b>	<b>110.44</b>	<b>51.11</b>	<b>157.89</b>	<b>47.79</b>	<b>103.61</b>	<b>126.53</b>	<b>132.09</b>	<b>49.52</b>	<b>103.19</b>	<b>115.34</b>	<b>159.78</b>	<b>111.32</b>	<b>77.95</b>	<b>129.55</b>	<b>106.29</b>	<b>110.43</b>	<b>130.17</b>	<b>105.63</b>	<b>1,928.65</b>
Total 2026 (including SFT)	162.22	72.64	242.56	67.64	147.87	195.25	228.59	69.64	152.30	170.07	225.53	163.44	112.63	191.21	152.99	162.25	203.54	154.49	2,874.86
Deduction for SFT in 2026 of 12.5%	20.28	9.08	30.32	8.45	18.48	24.41	28.57	8.71	19.04	21.26	28.19	20.43	14.08	23.90	19.12	20.28	25.44	19.31	359.36
<b>Total 2026 (excluding SFT)</b>	<b>141.94</b>	<b>63.56</b>	<b>212.24</b>	<b>59.18</b>	<b>129.39</b>	<b>170.85</b>	<b>200.01</b>	<b>60.94</b>	<b>133.27</b>	<b>148.81</b>	<b>197.34</b>	<b>143.01</b>	<b>98.55</b>	<b>167.31</b>	<b>133.86</b>	<b>141.97</b>	<b>178.09</b>	<b>135.18</b>	<b>2,515.51</b>
Growth in total expenditure 2009 - 2011	2.15	1.37	2.58	0.79	2.42	3.03	3.50	1.22	3.55	3.79	3.69	3.14	2.02	4.46	3.37	3.41	1.95	3.24	<b>49.66</b>
Growth in total expenditure 2011 - 2016	5.53	3.30	7.22	2.53	17.33	18.23	10.37	7.84	9.90	9.11	10.79	8.35	4.52	12.43	8.16	9.07	5.14	8.65	<b>158.48</b>
Growth in total expenditure 2016 - 2021	26.76	12.96	49.51	11.80	28.75	39.95	59.15	15.55	29.64	32.52	38.92	30.97	20.33	37.21	27.81	30.79	42.58	29.02	<b>564.22</b>
Growth in total expenditure 2021 - 2026	31.50	12.45	54.35	11.39	25.77	44.32	67.92	11.41	30.08	33.47	37.56	31.68	20.60	37.76	27.58	31.54	47.92	29.55	<b>586.85</b>
<b>Growth 2009 - 2026</b>	<b>65.94</b>	<b>30.08</b>	<b>113.67</b>	<b>26.52</b>	<b>74.28</b>	<b>105.53</b>	<b>140.94</b>	<b>36.02</b>	<b>73.17</b>	<b>78.88</b>	<b>90.95</b>	<b>74.14</b>	<b>47.48</b>	<b>91.86</b>	<b>66.92</b>	<b>74.80</b>	<b>97.60</b>	<b>70.46</b>	<b>1,359.22</b>

**NOTES:**

(1) The figures in the above table are the products of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).

(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure in 2009 using the study wide average SFT market share of 11.31% derived from the telephone survey of households.

We have grown the expenditure for SFT to an average of 11.8% in all zones by 2011 and from 2016 onwards we use the rate of 12.5% across all zones. There is a lack of data to forecast beyond 2016, and so we assume spending on SFT will level off, remaining at 12.5% in 2021 and 2026.

All monetary values are held constant at 2006 prices.

# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 5a - Comparison Goods Spending Patterns in 2009 as a Percentage Across the Study Area Zones (including SFT)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	TOTAL	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	
<b>1. Stores within OCA</b>																				
<b>Zone 1</b>																				
Thornbury	9.41	2.24	0.10	0.21	1.22	0.56	0.00	0.00	0.00	0.41	0.14	0.65	0.00	0.00	0.13	0.00	0.00	0.00	0.87	
Other stores, survey zone 1	0.31	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	
<b>Sub-total</b>	<b>9.72</b>	<b>2.24</b>	<b>0.10</b>	<b>0.21</b>	<b>1.38</b>	<b>0.56</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.41</b>	<b>0.14</b>	<b>0.65</b>	<b>0.00</b>	<b>0.00</b>	<b>0.13</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.90</b>	
<b>Zone 2</b>																				
Wotton-under-Edge	0.64	8.52	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.31	
Other stores, survey zone 2	0.07	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	
<b>Sub-total</b>	<b>0.71</b>	<b>8.87</b>	<b>0.30</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.32</b>	
<b>Zone 3</b>																				
Yate	2.45	10.98	26.55	22.99	0.75	10.02	1.71	6.18	0.00	0.67	1.15	0.85	1.05	0.00	0.73	0.42	0.90	0.00	4.59	
B&Q, Yate, Station Rd, Yate	1.54	4.84	8.98	7.82	0.07	5.36	0.91	1.54	0.00	0.06	0.00	0.20	0.19	0.06	0.00	0.00	0.00	0.00	1.64	
Other stores, survey zone 3	0.00	0.18	0.34	0.41	0.00	0.00	0.17	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.10	0.25	0.07	0.06	
<b>Sub-total</b>	<b>4.00</b>	<b>16.00</b>	<b>35.88</b>	<b>31.22</b>	<b>0.82</b>	<b>15.37</b>	<b>2.79</b>	<b>7.73</b>	<b>0.00</b>	<b>0.87</b>	<b>1.15</b>	<b>1.14</b>	<b>1.24</b>	<b>0.06</b>	<b>0.73</b>	<b>0.42</b>	<b>0.90</b>	<b>0.00</b>	<b>6.30</b>	
<b>Zone 4</b>																				
Chipping Sodbury	0.15	0.21	1.03	2.17	0.00	0.87	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.23	
Other stores, survey zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.15</b>	<b>0.21</b>	<b>1.03</b>	<b>2.17</b>	<b>0.00</b>	<b>0.87</b>	<b>0.22</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.07</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.23</b>	
<b>Zone 5</b>																				
Cribbs Causeway Retail Park	32.76	16.17	14.44	13.42	45.81	18.04	13.16	10.97	38.67	27.61	36.24	12.69	4.96	7.60	7.20	5.53	5.32	4.15	18.17	
The Mall at Cribbs Causeway	17.91	10.98	12.36	9.71	18.22	20.76	9.63	5.17	16.19	21.28	20.13	5.76	9.02	4.64	2.80	6.09	6.49	1.87	11.56	
Asda Wal-Mart Supercentre, Highwood Lane, Patchway	0.33	0.62	0.28	0.00	3.49	0.00	0.00	0.00	1.87	0.83	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	
Other stores, survey zone 5	0.08	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.12	0.00	0.21	0.00	0.00	0.10	0.00	0.25	0.07	0.00	0.06	
<b>Sub-total</b>	<b>51.08</b>	<b>27.77</b>	<b>27.08</b>	<b>23.26</b>	<b>67.52</b>	<b>38.80</b>	<b>22.78</b>	<b>16.14</b>	<b>56.84</b>	<b>48.73</b>	<b>56.93</b>	<b>16.45</b>	<b>13.98</b>	<b>12.34</b>	<b>10.00</b>	<b>11.86</b>	<b>11.88</b>	<b>6.02</b>	<b>30.20</b>	
<b>Zone 6</b>																				
Other stores, survey zone 6	0.50	0.00	0.15	0.00	0.00	1.20	0.00	0.00	0.00	0.00	0.00	0.18	0.10	0.00	0.00	0.07	0.00	0.00	0.13	
<b>Sub-total</b>	<b>0.50</b>	<b>0.00</b>	<b>0.15</b>	<b>0.00</b>	<b>0.00</b>	<b>1.20</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.18</b>	<b>0.10</b>	<b>0.00</b>	<b>0.00</b>	<b>0.07</b>	<b>0.00</b>	<b>0.00</b>	<b>0.13</b>	
<b>Zone 7</b>																				
Emmerson Green	0.00	0.12	1.33	1.38	0.00	3.03	7.17	4.67	0.07	0.20	0.07	6.28	9.42	7.03	7.62	1.77	5.32	0.71	3.02	
J Sainsbury, Emmerson Green	0.21	0.00	0.18	0.20	0.00	0.00	1.73	0.90	0.00	0.00	0.00	0.47	2.22	0.29	1.61	0.32	1.15	0.13	0.49	
Other stores, survey zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.21</b>	<b>0.12</b>	<b>1.51</b>	<b>1.59</b>	<b>0.00</b>	<b>3.03</b>	<b>8.90</b>	<b>5.56</b>	<b>0.07</b>	<b>0.20</b>	<b>0.07</b>	<b>6.75</b>	<b>11.64</b>	<b>7.32</b>	<b>9.22</b>	<b>2.08</b>	<b>6.47</b>	<b>0.83</b>	<b>3.51</b>	
<b>Zone 8</b>																				
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 9</b>																				
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.39	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.39</b>	<b>0.00</b>	<b>0.04</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.03</b>	
<b>Zone 10</b>																				
Filton	0.68	0.00	2.31	2.21	0.71	2.22	1.59	0.00	0.88	4.82	3.00	3.54	1.64	0.61	1.03	0.32	1.07	0.00	1.63	
Abbeywood Retail Park, Station Rd, Filton	0.60	0.00	0.34	0.00	0.79	0.34	0.14	0.00	1.71	1.58	1.22	0.11	0.00	0.09	0.31	0.13	0.23	0.00	0.48	
Other stores, survey zone 10	0.00	1.14	0.00	0.00	0.13	0.00	0.00	0.00	0.56	0.32	1.14	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.11	
<b>Sub-total</b>	<b>1.28</b>	<b>1.14</b>	<b>2.65</b>	<b>2.21</b>	<b>1.64</b>	<b>2.96</b>	<b>1.72</b>	<b>0.00</b>	<b>3.14</b>	<b>6.71</b>	<b>4.38</b>	<b>3.76</b>	<b>1.64</b>	<b>0.70</b>	<b>1.34</b>	<b>0.45</b>	<b>1.30</b>	<b>0.00</b>	<b>2.22</b>	
<b>Zone 11</b>																				
B&Q Warehouse, Foxden Road, Stoke Gifford	0.75	0.28	0.16	0.14	0.07	0.55	0.19	0.00	0.92	2.85	4.17	0.65	0.18	0.00	0.23	0.00	0.05	0.00	0.79	
Tesco, Brook Way, Bradley Stoke	0.64	0.00	0.56	0.26	0.27	0.61	0.17	0.00	0.13	0.91	2.17	0.13	0.17	0.00	0.20	0.09	0.00	0.00	0.45	
Bradley Stoke	0.23	0.00	0.15	0.20	0.32	0.19	0.00	0.00	0.00	0.39	0.93	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.18	
Other stores, survey zone 11	0.00	0.00	0.00	0.00	0.72	0.55	0.00	0.00	0.13	1.43	0.85	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.24	
<b>Sub-total</b>	<b>1.62</b>	<b>0.28</b>	<b>0.87</b>	<b>0.60</b>	<b>1.38</b>	<b>1.89</b>	<b>0.36</b>	<b>0.00</b>	<b>1.18</b>	<b>5.59</b>	<b>8.12</b>	<b>0.78</b>	<b>0.34</b>	<b>0.10</b>	<b>0.55</b>	<b>0.09</b>	<b>0.05</b>	<b>0.00</b>	<b>1.65</b>	
<b>Zone 12</b>																				
Downend	0.08	0.00	0.10	0.00	0.00	0.12	0.34	0.00	0.00	0.00	0.00	0.39	0.14	0.59	0.00	0.00	0.33	0.00	0.13	
Other stores, survey zone 12	0.00	0.00	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.20	0.07	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.08	
<b>Sub-total</b>	<b>0.08</b>	<b>0.00</b>	<b>0.10</b>	<b>0.66</b>	<b>0.00</b>	<b>0.12</b>	<b>0.34</b>	<b>0.00</b>	<b>0.00</b>	<b>0.20</b>	<b>0.07</b>	<b>1.13</b>	<b>0.14</b>	<b>0.59</b>	<b>0.00</b>	<b>0.00</b>	<b>0.33</b>	<b>0.00</b>	<b>0.21</b>	
<b>Zone 13</b>																				
Staple Hill	0.00	0.21	0.10	0.35	0.00	0.30	1.23	0.19	0.00	0.08	0.27	1.12	6.36	1.21	0.73	0.07	0.08	0.42	0.64	
Other stores, survey zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.21</b>	<b>0.10</b>	<b>0.35</b>	<b>0.00</b>	<b>0.30</b>	<b>1.23</b>	<b>0.19</b>	<b>0.00</b>	<b>0.08</b>	<b>0.27</b>	<b>1.12</b>	<b>6.36</b>	<b>1.21</b>	<b>0.73</b>	<b>0.07</b>	<b>0.08</b>	<b>0.42</b>	<b>0.64</b>	
<b>Zone 14</b>																				
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 15</b>																				
Kingswood	0.00	0.14	0.00	0.17	0.13	0.00	0.72	0.80	0.37	0.06	0.15	0.89	3.29	5.95	5.57	2.83	2.88	0.16	1.39	
Other stores, survey zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.14</b>	<b>0.00</b>	<b>0.17</b>	<b>0.13</b>	<b>0.00</b>	<b>0.72</b>	<b>0.80</b>	<b>0.37</b>	<b>0.06</b>	<b>0.15</b>	<b>0.89</b>	<b>3.29</b>	<b>5.95</b>	<b>5.57</b>	<b>2.83</b>	<b>2.88</b>	<b>0.16</b>	<b>1.45</b>	
<b>Zone 16</b>																				
Hanham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.07	0.81	0.22	0.00	0.08	
Longwell Green Retail Park, Longwell Green	0.15	0.65																		

# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 5b - Comparison Goods Spending Patterns in 2009 Across the Study Area Zones (including SFT): Scenario 2 (higher growth: SOS Proposed Changes RSS)

Total Expenditure £m	Zone 1 85.70	Zone 2 37.75	Zone 3 111.15	Zone 4 36.83	Zone 5 62.14	Zone 6 73.65	Zone 7 66.61	Zone 8 28.09	Zone 9 67.76	Zone 10 78.84	Zone 11 119.96	Zone 12 77.65	Zone 13 57.59	Zone 14 85.07	Zone 15 75.49	Zone 16 75.73	Zone 17 90.77	Zone 18 72.98	TOTAL 1,303.78	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	
<b>1. Stores within OCA</b>																				
<b>Zone 1</b>																				
Thornbury	8.07	0.85	0.11	0.08	0.76	0.41	0.00	0.00	0.00	0.32	0.17	0.51	0.00	0.00	0.00	0.10	0.00	0.00	11.37	
Other stores, survey zone 1	0.26	0.00	0.00	0.00	0.08	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	
<b>Sub-total</b>	<b>8.33</b>	<b>0.85</b>	<b>0.11</b>	<b>0.08</b>	<b>0.84</b>	<b>0.81</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.32</b>	<b>0.17</b>	<b>0.51</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.10</b>	<b>0.00</b>	<b>0.00</b>	<b>11.72</b>	
<b>Zone 2</b>																				
Wotton-under-Edge	0.55	3.22	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.10	
Other stores, survey zone 2	0.06	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	
<b>Sub-total</b>	<b>0.61</b>	<b>3.35</b>	<b>0.34</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>4.29</b>	
<b>Zone 3</b>																				
Yate	2.10	4.15	29.51	8.47	0.47	7.38	1.14	1.74	0.00	0.53	1.38	0.66	0.60	0.00	0.55	0.32	0.82	0.00	59.81	
B&Q, Yate, Station Rd, Yate	1.32	1.83	9.99	2.88	0.04	3.95	0.61	0.43	0.00	0.05	0.00	0.15	0.11	0.05	0.00	0.00	0.00	0.00	21.41	
Other stores, survey zone 3	0.00	0.07	0.38	0.15	0.00	0.00	0.11	0.00	0.00	0.11	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.89	
<b>Sub-total</b>	<b>3.43</b>	<b>6.04</b>	<b>30.88</b>	<b>11.80</b>	<b>0.51</b>	<b>11.32</b>	<b>1.86</b>	<b>2.17</b>	<b>0.00</b>	<b>0.69</b>	<b>1.38</b>	<b>0.88</b>	<b>0.71</b>	<b>0.05</b>	<b>0.55</b>	<b>0.32</b>	<b>0.82</b>	<b>0.00</b>	<b>62.11</b>	
<b>Zone 4</b>																				
Chipping Sodbury	0.13	0.00	1.15	0.80	0.00	0.64	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	3.00	
Other stores, survey zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.13</b>	<b>0.00</b>	<b>1.15</b>	<b>0.80</b>	<b>0.00</b>	<b>0.64</b>	<b>0.15</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3.00</b>	
<b>Zone 5</b>																				
Cribbs Causeway Retail Park	28.08	6.10	16.05	4.94	28.46	13.28	8.76	3.08	26.20	21.77	43.47	9.86	2.86	6.47	5.43	4.19	4.83	3.03	236.86	
The Mall at Cribbs Causeway	15.35	4.15	13.73	3.58	11.32	15.29	6.41	1.45	10.97	16.78	24.15	4.47	5.20	3.95	2.11	4.61	5.89	1.37	150.77	
Asda Wal-Mart Supercentre, Highwood Lane, Patchway	0.28	0.23	0.32	0.00	2.17	0.00	0.00	0.00	1.27	0.66	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.35	
Other stores, survey zone 5	0.07	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.08	0.00	0.25	0.00	0.00	0.09	0.00	0.19	0.06	0.00	0.78	
<b>Sub-total</b>	<b>43.78</b>	<b>10.48</b>	<b>30.10</b>	<b>8.57</b>	<b>41.95</b>	<b>28.57</b>	<b>15.18</b>	<b>4.54</b>	<b>38.52</b>	<b>39.21</b>	<b>68.30</b>	<b>14.32</b>	<b>8.05</b>	<b>10.50</b>	<b>7.85</b>	<b>6.98</b>	<b>10.78</b>	<b>4.40</b>	<b>363.77</b>	
<b>Zone 6</b>																				
Other stores, survey zone 6	0.42	0.00	0.17	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.00	0.14	0.06	0.00	0.00	0.05	0.00	0.00	1.73	
<b>Sub-total</b>	<b>0.42</b>	<b>0.00</b>	<b>0.17</b>	<b>0.00</b>	<b>0.00</b>	<b>0.88</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.14</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>1.73</b>	
<b>Zone 7</b>																				
Emerson Green	0.00	0.05	1.48	0.51	0.00	2.23	4.78	1.31	0.05	0.15	0.09	4.88	5.42	5.98	5.75	1.34	4.83	0.51	39.37	
J Sainsbury, Emersons Green	0.18	0.00	0.20	0.07	0.00	0.00	1.15	0.25	0.00	0.00	0.00	0.36	1.28	0.25	1.21	0.24	1.04	0.09	6.34	
Other stores, survey zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.18</b>	<b>0.05</b>	<b>1.68</b>	<b>0.58</b>	<b>0.00</b>	<b>2.23</b>	<b>5.93</b>	<b>1.56</b>	<b>0.05</b>	<b>0.15</b>	<b>0.09</b>	<b>5.24</b>	<b>6.70</b>	<b>6.23</b>	<b>6.96</b>	<b>1.58</b>	<b>5.87</b>	<b>0.51</b>	<b>45.70</b>	
<b>Zone 8</b>																				
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 9</b>																				
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.27	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.37	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.27</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.37</b>	
<b>Zone 10</b>																				
Filton	0.58	0.00	2.57	0.81	0.44	1.64	1.06	0.00	0.60	3.80	3.60	2.75	0.95	0.52	0.78	0.24	0.27	0.00	21.30	
Abbeywood Retail Park, Station Rd, Filton	0.51	0.00	0.38	0.00	0.49	0.25	0.09	0.00	1.16	1.24	1.46	0.09	0.00	0.07	0.24	0.10	0.21	0.00	6.29	
Other stores, survey zone 10	0.00	0.43	0.00	0.00	0.08	0.00	0.00	0.00	0.38	0.25	0.17	0.09	0.00	0.00	0.00	0.00	0.00	0.00	1.39	
<b>Sub-total</b>	<b>1.10</b>	<b>0.43</b>	<b>2.95</b>	<b>0.81</b>	<b>1.02</b>	<b>1.89</b>	<b>1.15</b>	<b>0.00</b>	<b>2.13</b>	<b>5.29</b>	<b>5.23</b>	<b>2.92</b>	<b>0.95</b>	<b>0.60</b>	<b>1.01</b>	<b>0.34</b>	<b>1.18</b>	<b>0.00</b>	<b>28.99</b>	
<b>Zone 11</b>																				
B&Q Warehouse, Foxden Road, Stoke Gifford	0.64	0.11	0.18	0.05	0.05	0.41	0.13	0.00	0.62	2.25	5.00	0.50	0.10	0.00	0.18	0.00	0.04	0.00	10.26	
Tesco, Brook Way, Bradley Stoke	0.55	0.00	0.62	0.09	0.17	0.45	0.11	0.00	0.09	0.72	2.61	0.10	0.10	0.00	0.15	0.07	0.00	0.00	5.82	
Bradley Stoke	0.19	0.00	0.17	0.07	0.20	0.14	0.00	0.00	0.00	0.31	1.12	0.00	0.00	0.00	0.08	0.00	0.00	0.00	2.29	
Other stores, survey zone 11	0.00	0.00	0.00	0.00	0.45	0.40	0.00	0.00	0.09	1.13	1.02	0.00	0.00	0.09	0.00	0.00	0.00	0.00	3.17	
<b>Sub-total</b>	<b>1.39</b>	<b>0.11</b>	<b>0.97</b>	<b>0.22</b>	<b>0.66</b>	<b>1.39</b>	<b>0.24</b>	<b>0.00</b>	<b>0.80</b>	<b>4.41</b>	<b>9.74</b>	<b>0.61</b>	<b>0.20</b>	<b>0.09</b>	<b>0.41</b>	<b>0.07</b>	<b>0.04</b>	<b>0.00</b>	<b>21.54</b>	
<b>Zone 12</b>																				
Downend	0.07	0.00	0.11	0.00	0.00	0.09	0.23	0.00	0.00	0.00	0.00	0.30	0.08	0.51	0.00	0.00	0.30	0.00	1.69	
Other stores, survey zone 12	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.16	0.09	0.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.07	
<b>Sub-total</b>	<b>0.07</b>	<b>0.00</b>	<b>0.11</b>	<b>0.24</b>	<b>0.00</b>	<b>0.09</b>	<b>0.23</b>	<b>0.00</b>	<b>0.16</b>	<b>0.09</b>	<b>0.88</b>	<b>0.08</b>	<b>0.08</b>	<b>0.51</b>	<b>0.00</b>	<b>0.00</b>	<b>0.30</b>	<b>0.00</b>	<b>2.76</b>	
<b>Zone 13</b>																				
Staple Hill	0.00	0.08	0.11	0.13	0.00	0.22	0.82	0.05	0.00	0.07	0.33	0.87	3.66	1.03	0.55	0.05	0.07	0.31	8.37	
Other stores, survey zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.08</b>	<b>0.11</b>	<b>0.13</b>	<b>0.00</b>	<b>0.22</b>	<b>0.82</b>	<b>0.05</b>	<b>0.00</b>	<b>0.07</b>	<b>0.33</b>	<b>0.87</b>	<b>3.66</b>	<b>1.03</b>	<b>0.55</b>	<b>0.05</b>	<b>0.07</b>	<b>0.31</b>	<b>8.37</b>	
<b>Zone 14</b>																				
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 15</b>																				
Kingswood	0.00	0.05	0.00	0.06	0.08	0.00	0.48	0.22	0.25	0.05	0.18	0.69	1.89	5.06	4.21	2.14	2.61	0.12	18.11	
Other stores, survey zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.16	0.09	0.40	0.00	0.00	0.00	0.75	
<b>Sub-total</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.06</b>	<b>0.08</b>	<b>0.00</b>	<b>0.48</b>	<b>0.22</b>	<b>0.25</b>	<b>0.05</b>	<b>0.18</b>	<b>0.79</b>	<b>2.05</b>	<b>5.15</b>	<b>4.60</b>	<b>2.14</b>	<b>2.61</b>	<b>0.12</b>	<b>18.86</b>	
<b>Zone 16</b>																				
Hanham	0.00	0.00	0.00	0.00																

**SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY**

**Spreadsheet 6 - 2009 Total Expenditure on Different Categories of Comparison Goods & Expenditure Growth: Scenario 2 (higher growth: SOS Proposed Changes RSS)**

**Table A - Per Capita Expenditure on Different Categories of Comparison Goods in 2006 and 2009**

	Expenditure Category	Expenditure per capita (£)																	
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18
2006	Clothes and Shoes	£ 734	£ 737	£ 740	£ 748	£ 700	£ 718	£ 792	£ 727	£ 627	£ 680	£ 819	£ 681	£ 682	£ 678	£ 693	£ 695	£ 734	£ 719
	Furniture, Carpets, Soft Household Furnish	£ 382	£ 386	£ 365	£ 402	£ 360	£ 391	£ 410	£ 379	£ 318	£ 361	£ 401	£ 368	£ 361	£ 348	£ 360	£ 364	£ 375	£ 390
	DIY and Decorating Goods	£ 356	£ 357	£ 345	£ 371	£ 344	£ 365	£ 370	£ 354	£ 310	£ 343	£ 363	£ 348	£ 347	£ 332	£ 347	£ 345	£ 351	£ 364
	Domestic Appliances	£ 542	£ 545	£ 532	£ 563	£ 520	£ 546	£ 578	£ 540	£ 463	£ 511	£ 577	£ 518	£ 518	£ 502	£ 521	£ 521	£ 540	£ 546
	Other Goods	£ 1,178	£ 1,180	£ 1,144	£ 1,225	#####	£ 1,195	£ 1,242	£ 1,166	£ 1,001	£ 1,115	£ 1,234	£ 1,134	£ 1,131	£ 1,088	£ 1,132	£ 1,132	£ 1,163	£ 1,189
	<b>Total Comparison Goods Expenditure</b>	<b>£ 3,192</b>	<b>£ 3,205</b>	<b>£ 3,126</b>	<b>£ 3,309</b>	<b>#####</b>	<b>£ 3,215</b>	<b>£ 3,392</b>	<b>£ 3,166</b>	<b>£ 2,719</b>	<b>£ 3,010</b>	<b>£ 3,394</b>	<b>£ 3,049</b>	<b>£ 3,039</b>	<b>£ 2,948</b>	<b>£ 3,053</b>	<b>£ 3,057</b>	<b>£ 3,163</b>	<b>£ 3,208</b>
2009	Clothes and Shoes	£ 822	£ 826	£ 829	£ 838	£ 784	£ 805	£ 887	£ 815	£ 703	£ 762	£ 918	£ 763	£ 764	£ 760	£ 776	£ 779	£ 822	£ 806
	Furniture, Carpets, Soft Household Furnish	£ 428	£ 433	£ 409	£ 450	£ 403	£ 438	£ 459	£ 425	£ 356	£ 404	£ 449	£ 412	£ 404	£ 390	£ 403	£ 408	£ 420	£ 437
	DIY and Decorating Goods	£ 399	£ 400	£ 387	£ 416	£ 385	£ 409	£ 415	£ 397	£ 347	£ 384	£ 407	£ 390	£ 389	£ 372	£ 389	£ 387	£ 393	£ 408
	Domestic Appliances	£ 607	£ 611	£ 596	£ 631	£ 583	£ 612	£ 648	£ 605	£ 519	£ 573	£ 647	£ 580	£ 580	£ 562	£ 584	£ 584	£ 605	£ 612
	Other Goods	£ 1,320	£ 1,322	£ 1,282	£ 1,373	#####	£ 1,339	£ 1,392	£ 1,306	£ 1,122	£ 1,249	£ 1,383	£ 1,271	£ 1,267	£ 1,219	£ 1,268	£ 1,268	£ 1,303	£ 1,332
	<b>Total Comparison Goods Expenditure</b>	<b>£ 3,577</b>	<b>£ 3,591</b>	<b>£ 3,503</b>	<b>£ 3,708</b>	<b>#####</b>	<b>£ 3,602</b>	<b>£ 3,801</b>	<b>£ 3,547</b>	<b>£ 3,047</b>	<b>£ 3,373</b>	<b>£ 3,803</b>	<b>£ 3,416</b>	<b>£ 3,405</b>	<b>£ 3,303</b>	<b>£ 3,421</b>	<b>£ 3,425</b>	<b>£ 3,544</b>	<b>£ 3,594</b>

**Table B - Population in 2009**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Total
Population 2009	23,962	10,513	31,733	9,934	18,195	20,445	17,525	7,920	22,243	23,377	31,544	22,729	16,913	25,755	22,067	22,110	25,611	20,303	372,881

**Table C - Total Expenditure on Different Categories of Comparison Goods, 2009**

	Expenditure Category	Total Expenditure (in £m)																		Total
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	
2009	Clothes and Shoes	19.71	8.68	26.31	8.33	14.27	16.45	15.55	6.45	15.63	17.81	28.95	17.34	12.92	19.57	17.14	17.22	21.06	16.36	299.74
	Furniture, Carpets, Soft Household Furnishings	10.26	4.55	12.98	4.47	7.34	8.96	8.05	3.36	7.93	9.46	14.17	9.37	6.84	10.04	8.90	9.02	10.76	8.87	155.33
	DIY and Decorating Goods	9.56	4.21	12.27	4.13	7.01	8.36	7.27	3.14	7.73	8.98	12.83	8.86	6.58	9.58	8.58	8.55	10.07	8.28	145.98
	Domestic Appliances	14.55	6.42	18.92	6.27	10.60	12.51	11.35	4.79	11.54	13.39	20.39	13.19	9.82	14.49	12.88	12.91	15.50	12.42	221.93
	Other Goods	31.63	13.90	40.68	13.64	22.92	27.38	24.39	10.35	24.95	29.21	43.61	28.88	21.43	31.40	27.99	28.04	33.37	27.05	480.80
	<b>Total Comparison Goods Expenditure</b>	<b>85.70</b>	<b>37.75</b>	<b>111.15</b>	<b>36.83</b>	<b>62.14</b>	<b>73.65</b>	<b>66.61</b>	<b>28.09</b>	<b>67.76</b>	<b>78.84</b>	<b>119.96</b>	<b>77.65</b>	<b>57.59</b>	<b>85.07</b>	<b>75.49</b>	<b>75.73</b>	<b>90.77</b>	<b>72.98</b>	<b>1,303.78</b>

**NOTES:**

- (1) Table A sets out per capita expenditure on five different categories of comparison goods. The expenditure data is derived from MapInfo 2006 per capita annual comparison goods expenditure estimates, which we have obtained through our in-house GIS system. The 2006 MapInfo expenditure data has been projected forward to the base year of the study (2009). To do this we use an actual growth rate in comparison spend of 6.0% between 2006 and 2007 and then two years of forecast growth at 4.0% per annum to bring the expenditure to 2009. The source for the growth rates is MapInfo/OEF Information Brief 08/2 (Table 1 & 2).
- (2) Table B sets out the total population in each zone in 2009.
- (3) The figures in Table C are the products of multiplying the data presented in Table A (2009 per capita expenditure) by Table B (population) and are in millions of pounds (£m).

All monetary values are held constant at 2006 prices.



# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 6b - Clothing and Footwear: Spending Patterns in 2009 (in £m) Across the Study Area Zones: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	TOTAL
<b>Total Expenditure: Clothing &amp; Footwear 2009 (£m)</b>	<b>19.71</b>	<b>8.68</b>	<b>26.31</b>	<b>8.33</b>	<b>14.27</b>	<b>16.45</b>	<b>15.55</b>	<b>6.45</b>	<b>15.63</b>	<b>17.81</b>	<b>28.95</b>	<b>17.34</b>	<b>12.92</b>	<b>19.57</b>	<b>17.14</b>	<b>17.22</b>	<b>21.06</b>	<b>16.36</b>	<b>299.74</b>
<b>1. Stores within OCA</b>																			
<b>Zone 1</b>																			
Thornbury	2.48	0.36	0.00	0.08	0.18	0.19	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.10	0.00	0.00	3.51
Other stores, survey zone 1	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08
<b>Sub-total</b>	<b>2.48</b>	<b>0.36</b>	<b>0.00</b>	<b>0.08</b>	<b>0.26</b>	<b>0.19</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.12</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.10</b>	<b>0.00</b>	<b>0.00</b>	<b>3.59</b>
<b>Zone 2</b>																			
Wotton-under-Edge	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34
Other stores, survey zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.34</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.34</b>
<b>Zone 3</b>																			
Yate	1.06	1.09	7.95	1.85	0.36	2.31	0.25	0.60	0.00	0.18	0.36	0.36	0.17	0.00	0.37	0.00	0.00	0.00	16.92
Other stores, survey zone 3	0.00	0.00	0.17	0.08	0.00	0.00	0.11	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.47
<b>Sub-total</b>	<b>1.06</b>	<b>1.09</b>	<b>8.11</b>	<b>1.93</b>	<b>0.36</b>	<b>2.31</b>	<b>0.36</b>	<b>0.60</b>	<b>0.00</b>	<b>0.29</b>	<b>0.36</b>	<b>0.36</b>	<b>0.17</b>	<b>0.00</b>	<b>0.37</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>17.39</b>
<b>Zone 4</b>																			
Chipping Sodbury	0.00	0.08	0.67	0.33	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.16
Other stores, survey zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.08</b>	<b>0.67</b>	<b>0.33</b>	<b>0.00</b>	<b>0.09</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.16</b>
<b>Zone 5</b>																			
The Mall at Cribbs Causeway, Patchway	6.00	1.71	6.59	1.43	3.82	6.15	2.98	0.60	5.52	5.70	10.20	2.35	2.20	1.31	0.27	0.84	2.15	0.82	60.66
Cribbs Causeway Retail Park, Lysander Rd, Patchway	4.13	1.41	2.52	0.76	4.56	1.13	1.51	0.40	1.53	2.30	7.02	2.19	0.52	0.96	1.22	0.35	0.56	0.18	33.26
Asda Wal-Mart Supercentre, Highwood Lane, Patchway	0.28	0.10	0.00	0.00	1.21	0.00	0.00	0.00	1.13	0.18	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.33
Other stores, survey zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.19
<b>Sub-total</b>	<b>10.41</b>	<b>3.22</b>	<b>9.11</b>	<b>2.20</b>	<b>9.59</b>	<b>7.28</b>	<b>4.49</b>	<b>1.00</b>	<b>8.18</b>	<b>8.18</b>	<b>17.65</b>	<b>4.54</b>	<b>2.72</b>	<b>2.27</b>	<b>1.49</b>	<b>1.37</b>	<b>2.71</b>	<b>1.01</b>	<b>97.43</b>
<b>Zone 6</b>																			
Other stores, survey zone 6	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.25
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.17</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.25</b>
<b>Zone 7</b>																			
Emerson Green	0.00	0.00	0.37	0.08	0.00	0.75	0.59	0.29	0.00	0.00	0.00	0.93	0.62	0.35	0.67	0.27	0.37	0.00	5.28
J Sainsbury, Emersons Green	0.18	0.00	0.20	0.00	0.00	0.00	0.59	0.18	0.00	0.00	0.00	0.28	0.71	0.18	0.79	0.17	0.18	0.00	3.46
Other stores, survey zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.18</b>	<b>0.00</b>	<b>0.57</b>	<b>0.08</b>	<b>0.00</b>	<b>0.75</b>	<b>1.18</b>	<b>0.47</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.20</b>	<b>1.33</b>	<b>0.53</b>	<b>1.46</b>	<b>0.45</b>	<b>0.55</b>	<b>0.00</b>	<b>8.74</b>
<b>Zone 8</b>																			
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 9</b>																			
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.08</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.08</b>
<b>Zone 10</b>																			
Filton	0.19	0.00	0.85	0.17	0.00	0.36	0.25	0.09	0.34	1.83	0.76	0.57	0.33	0.43	0.27	0.09	0.35	0.00	6.79
Abbeywood Retail Park, Station Rd, Filton	0.00	0.00	0.20	0.00	0.36	0.19	0.00	0.00	0.51	1.02	1.19	0.09	0.00	0.00	0.08	0.10	0.00	0.00	3.73
Other stores, survey zone 10	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.16	0.20	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.53
<b>Sub-total</b>	<b>0.19</b>	<b>0.00</b>	<b>1.05</b>	<b>0.17</b>	<b>0.44</b>	<b>0.55</b>	<b>0.25</b>	<b>0.00</b>	<b>1.00</b>	<b>3.05</b>	<b>1.95</b>	<b>0.74</b>	<b>0.33</b>	<b>0.43</b>	<b>0.35</b>	<b>0.19</b>	<b>0.35</b>	<b>0.00</b>	<b>11.05</b>
<b>Zone 11</b>																			
Fetico, Brook Way Bradley Stoke	0.46	0.00	0.62	0.09	0.17	0.35	0.11	0.00	0.09	0.40	1.27	0.10	0.10	0.00	0.08	0.00	0.00	0.00	3.85
Other stores, survey zone 11	0.19	0.00	0.17	0.00	0.18	0.37	0.00	0.00	0.09	0.49	0.95	0.00	0.00	0.09	0.08	0.00	0.00	0.00	2.62
<b>Sub-total</b>	<b>0.66</b>	<b>0.00</b>	<b>0.79</b>	<b>0.09</b>	<b>0.34</b>	<b>0.73</b>	<b>0.11</b>	<b>0.00</b>	<b>0.18</b>	<b>0.89</b>	<b>2.22</b>	<b>0.10</b>	<b>0.10</b>	<b>0.09</b>	<b>0.17</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>6.47</b>
<b>Zone 12</b>																			
Other stores, survey zone 12	0.00	0.00	0.00	0.00	0.00	0.09	0.23	0.00	0.00	0.00	0.00	0.09	0.08	0.00	0.00	0.00	0.09	0.00	0.58
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.23</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.08</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.00</b>	<b>0.58</b>
<b>Zone 13</b>																			
Staple Hill	0.00	0.08	0.00	0.00	0.00	0.00	0.25	0.00	0.00	0.00	0.00	0.46	0.54	0.00	0.00	0.00	0.00	0.00	1.33
Other stores, survey zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.08</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.25</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.46</b>	<b>0.54</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.33</b>
<b>Zone 14</b>																			
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 15</b>																			
Kingswood	0.00	0.00	0.00	0.00	0.08	0.00	0.11	0.00	0.00	0.00	0.12	0.19	0.52	1.49	0.65	0.49	0.63		

# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 6c - Furniture: Spending Patterns in 2009 as a Percentage Across the Study Area Zones: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	TOTAL	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	
<b>1. Stores within OCA</b>																				
<b>Zone 1</b>																				
Thornbury	6.04	1.16	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50
Other stores, survey zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>6.04</b>	<b>1.16</b>	<b>0.85</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.50</b>
<b>Zone 2</b>																				
Wotton-under-Edge	1.24	8.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34
Other stores, survey zone 2	0.54	2.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12
<b>Sub-total</b>	<b>1.78</b>	<b>11.55</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.46</b>
<b>Zone 3</b>																				
Yate	2.48	9.82	20.44	14.07	1.52	3.77	1.32	0.00	0.00	1.75	0.00	0.00	2.29	0.00	0.00	0.00	0.00	0.00	0.00	3.13
Other stores, survey zone 3	0.00	1.16	2.12	1.06	0.00	0.70	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35
<b>Sub-total</b>	<b>2.48</b>	<b>10.99</b>	<b>22.56</b>	<b>15.13</b>	<b>1.52</b>	<b>4.47</b>	<b>2.63</b>	<b>0.00</b>	<b>0.00</b>	<b>1.75</b>	<b>0.00</b>	<b>0.00</b>	<b>2.29</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3.48</b>
<b>Zone 4</b>																				
Other stores, survey zone 4	1.24	0.00	0.00	2.92	0.00	0.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.24
<b>Sub-total</b>	<b>1.24</b>	<b>0.00</b>	<b>0.00</b>	<b>2.92</b>	<b>0.00</b>	<b>0.70</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.57</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>
<b>Zone 5</b>																				
The Mall at Cribbs Causeway, Patchway	16.94	10.43	10.85	8.75	10.94	11.76	7.52	6.37	5.29	22.05	12.72	3.93	5.40	1.45	1.70	3.34	6.47	1.77	8.49	
Cribbs Causeway Retail Park, Lysander Rd, Patchway	37.14	18.48	24.04	19.90	46.82	21.54	15.51	21.58	44.79	34.27	45.22	23.26	11.79	10.71	12.94	10.39	11.70	5.03	23.86	
Other stores, survey zone 5	0.69	0.00	0.00	1.06	2.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.00	0.25	
<b>Sub-total</b>	<b>54.77</b>	<b>28.91</b>	<b>34.90</b>	<b>29.71</b>	<b>60.20</b>	<b>33.30</b>	<b>23.03</b>	<b>27.96</b>	<b>50.09</b>	<b>56.32</b>	<b>57.94</b>	<b>27.20</b>	<b>17.19</b>	<b>13.04</b>	<b>14.64</b>	<b>13.74</b>	<b>18.17</b>	<b>6.79</b>	<b>32.59</b>	
<b>Zone 6</b>																				
Other stores, survey zone 6	0.00	0.00	0.00	0.00	0.00	6.27	0.00	0.00	0.00	0.00	0.00	0.60	0.82	0.00	0.00	0.60	0.00	0.00	0.00	0.47
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>6.27</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.60</b>	<b>0.82</b>	<b>0.00</b>	<b>0.00</b>	<b>0.60</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.47</b>
<b>Zone 7</b>																				
Emerson Green	0.00	0.00	0.00	0.00	0.00	1.02	2.21	0.00	0.63	0.00	0.63	3.32	3.93	4.05	7.42	1.56	1.14	0.75	1.54	
Other stores, survey zone 7	0.00	0.00	0.00	0.00	0.00	2.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.02</b>	<b>4.42</b>	<b>0.00</b>	<b>0.63</b>	<b>0.00</b>	<b>0.63</b>	<b>3.32</b>	<b>3.93</b>	<b>4.05</b>	<b>7.42</b>	<b>1.56</b>	<b>1.14</b>	<b>0.75</b>	<b>1.65</b>	
<b>Zone 8</b>																				
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 9</b>																				
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.76</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.04</b>
<b>Zone 10</b>																				
Other stores, survey zone 10	1.78	0.00	0.85	1.06	1.22	1.41	0.89	0.00	4.26	1.04	0.45	1.81	2.46	0.88	2.33	0.96	2.16	0.00	1.34	
<b>Sub-total</b>	<b>1.78</b>	<b>0.00</b>	<b>0.85</b>	<b>1.06</b>	<b>1.22</b>	<b>1.41</b>	<b>0.89</b>	<b>0.00</b>	<b>4.26</b>	<b>1.04</b>	<b>0.45</b>	<b>1.81</b>	<b>2.46</b>	<b>0.88</b>	<b>2.33</b>	<b>0.96</b>	<b>2.16</b>	<b>0.00</b>	<b>1.34</b>	
<b>Zone 11</b>																				
Other stores, survey zone 11	0.69	0.00	0.00	0.00	5.76	0.70	0.00	0.00	0.00	1.75	3.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.76
<b>Sub-total</b>	<b>0.69</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>5.76</b>	<b>0.70</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.75</b>	<b>3.25</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.76</b>
<b>Zone 12</b>																				
Other stores, survey zone 12	0.69	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	1.04	0.63	1.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35
<b>Sub-total</b>	<b>0.69</b>	<b>0.00</b>	<b>0.85</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.04</b>	<b>0.63</b>	<b>1.81</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.35</b>
<b>Zone 13</b>																				
Other stores, survey zone 13	0.00	0.00	0.85	2.92	0.00	0.00	4.89	1.61	0.00	0.70	0.00	2.11	10.15	0.57	0.00	0.60	0.00	0.00	1.13	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.85</b>	<b>2.92</b>	<b>0.00</b>	<b>0.00</b>	<b>4.89</b>	<b>1.61</b>	<b>0.00</b>	<b>0.70</b>	<b>0.00</b>	<b>2.11</b>	<b>10.15</b>	<b>0.57</b>	<b>0.00</b>	<b>0.60</b>	<b>0.00</b>	<b>0.00</b>	<b>1.13</b>	
<b>Zone 14</b>																				
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 15</b>																				
Kingswood	0.00	1.16	0.00	0.00	0.00	0.00	0.89	0.00	0.00	0.00	0.45	1.20	0.82	4.05	3.60	0.00	0.00	0.75	0.74	
Other stores, survey zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>1.16</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.89</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.45</b>	<b>1.20</b>	<b>0.82</b>	<b>4.05</b>	<b>3.60</b>	<b>0.00</b>	<b>0.00</b>	<b>0.75</b>	<b>0.74</b>	
<b>Zone 16</b>																				
Longwell Green Retail Park, Longwell Green	0.00	0.00	1.92	0.00	0.00	1.72	10.62	11.98	0.00	0.70	0.00	3.63	8.34	14.52	15.04	12.32	18.41	7.07	5.89	
Other stores, survey zone 16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.88	0.63	0.00	1.78	0.00	0.22	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>1.92</b>	<b>0.00</b>	<b>0.00</b>	<b>1.72</b>	<b>10.62</b>	<b>11.98</b>	<b>0.00</b>	<b>0.70</b>	<b>0.00</b>	<b>3.63</b>	<b>8.34</b>	<b>15.40</b>	<b>15.67</b>	<b>12.32</b>	<b>20.19</b>	<b>7.07</b>	<b>6.11</b>	
<b>Zone 17</b>																				
Other stores, survey zone 17	0.00	0.00	0.85	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.47	0.57	1.70	0.96	0.00	0.00	0.00	0.36
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.85</b>	<b>1.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.47</b>	<b>0.57</b>	<b>1.70</b>	<b>0.96</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.36</b>
<b>Zone 18</b>																				
Other stores, survey zone 18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Combined sub-total for Zones 1 to 18</b>	<b>69.47</b>	<b>53.77</b>	<b>63.61</b>	<b>52.80</b>	<b>69.46</b>	<b>49.60</b>	<b>47.37</b>	<b>41.95</b>	<b>54.98</b>	<b>63.31</b>	<b>63.36</b>	<b>41.68</b>	<b>47.47</b>	<b>39.14</b>	<b>45.35</b>	<b>30.72</b>	<b>41.66</b>	<b>15.35</b>	<b>50.22</b>	
<b>2. Stores outside OCA</b>																				
Bristol City Centre/Broad																				



# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 6d - Furniture: Spending Patterns in 2009 (in £m) Across the Study Area Zones: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	TOTAL	
<b>Total Expenditure: Furniture 2009 (£m)</b>	<b>10.26</b>	<b>4.55</b>	<b>12.98</b>	<b>4.47</b>	<b>7.34</b>	<b>8.96</b>	<b>8.05</b>	<b>3.36</b>	<b>7.93</b>	<b>9.46</b>	<b>14.17</b>	<b>9.37</b>	<b>6.84</b>	<b>10.04</b>	<b>8.90</b>	<b>9.02</b>	<b>10.76</b>	<b>8.87</b>	<b>155.33</b>	
<b>1. Stores within OCA</b>																				
<b>Zone 1</b>																				
Thornbury	0.62	0.05	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.78
Other stores, survey zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.62</b>	<b>0.05</b>	<b>0.11</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.78</b>
<b>Zone 2</b>																				
Watson-under-Edge	0.13	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52
Other stores, survey zone 2	0.06	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19
<b>Sub-total</b>	<b>0.18</b>	<b>0.53</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.71</b>
<b>Zone 3</b>																				
Yate	0.25	0.45	2.65	0.63	0.11	0.34	0.11	0.00	0.00	0.17	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	4.86
Other stores, survey zone 3	0.00	0.05	0.27	0.05	0.00	0.06	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.54
<b>Sub-total</b>	<b>0.25</b>	<b>0.50</b>	<b>2.93</b>	<b>0.68</b>	<b>0.11</b>	<b>0.40</b>	<b>0.21</b>	<b>0.00</b>	<b>0.00</b>	<b>0.17</b>	<b>0.00</b>	<b>0.00</b>	<b>0.16</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>5.40</b>
<b>Zone 4</b>																				
Other stores, survey zone 4	0.13	0.00	0.00	0.13	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.38
<b>Sub-total</b>	<b>0.13</b>	<b>0.00</b>	<b>0.00</b>	<b>0.13</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.38</b>
<b>Zone 5</b>																				
The Mall at Cribbs Causeway, Patchway	1.74	0.47	1.41	0.39	0.80	1.05	0.61	0.21	0.42	2.09	1.80	0.37	0.37	0.15	0.15	0.30	0.70	0.16	13.18	
Cribbs Causeway Retail Park, Lysander Rd, Patchway	3.81	0.84	3.12	0.89	3.44	1.93	1.25	0.73	3.55	3.24	6.41	2.18	0.81	1.08	1.15	0.94	1.26	0.45	37.06	
Other stores, survey zone 5	0.07	0.00	0.00	0.05	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.39	
<b>Sub-total</b>	<b>5.62</b>	<b>1.31</b>	<b>4.53</b>	<b>1.33</b>	<b>4.42</b>	<b>2.96</b>	<b>1.85</b>	<b>0.94</b>	<b>3.97</b>	<b>5.33</b>	<b>8.21</b>	<b>2.55</b>	<b>1.18</b>	<b>1.31</b>	<b>1.30</b>	<b>1.24</b>	<b>1.96</b>	<b>0.60</b>	<b>50.63</b>	
<b>Zone 6</b>																				
Other stores, survey zone 6	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.06	0.06	0.00	0.00	0.05	0.00	0.00	0.00	0.73
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.56</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.73</b>
<b>Zone 7</b>																				
Emerson Green	0.00	0.00	0.00	0.00	0.00	0.09	0.18	0.00	0.05	0.00	0.09	0.31	0.27	0.41	0.66	0.14	0.12	0.07	2.39	
Other stores, survey zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.36</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.09</b>	<b>0.31</b>	<b>0.27</b>	<b>0.41</b>	<b>0.66</b>	<b>0.14</b>	<b>0.12</b>	<b>0.07</b>	<b>2.56</b>	
<b>Zone 8</b>																				
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 9</b>																				
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 10</b>																				
Other stores, survey zone 10	0.18	0.00	0.11	0.05	0.09	0.13	0.07	0.00	0.34	0.10	0.06	0.17	0.17	0.09	0.21	0.09	0.23	0.00	2.08	
<b>Sub-total</b>	<b>0.18</b>	<b>0.00</b>	<b>0.11</b>	<b>0.05</b>	<b>0.09</b>	<b>0.13</b>	<b>0.07</b>	<b>0.00</b>	<b>0.34</b>	<b>0.10</b>	<b>0.06</b>	<b>0.17</b>	<b>0.17</b>	<b>0.09</b>	<b>0.21</b>	<b>0.09</b>	<b>0.23</b>	<b>0.00</b>	<b>2.08</b>	
<b>Zone 11</b>																				
Other stores, survey zone 11	0.07	0.00	0.00	0.00	0.42	0.06	0.00	0.00	0.00	0.17	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.18	
<b>Sub-total</b>	<b>0.07</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.42</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.17</b>	<b>0.46</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.18</b>	
<b>Zone 12</b>																				
Other stores, survey zone 12	0.07	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.09	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.54	
<b>Sub-total</b>	<b>0.07</b>	<b>0.00</b>	<b>0.11</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.10</b>	<b>0.09</b>	<b>0.17</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.54</b>	
<b>Zone 13</b>																				
Other stores, survey zone 13	0.00	0.00	0.11	0.13	0.00	0.00	0.39	0.05	0.00	0.07	0.00	0.20	0.69	0.06	0.00	0.05	0.00	0.00	1.76	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.11</b>	<b>0.13</b>	<b>0.00</b>	<b>0.00</b>	<b>0.39</b>	<b>0.05</b>	<b>0.00</b>	<b>0.07</b>	<b>0.00</b>	<b>0.20</b>	<b>0.69</b>	<b>0.06</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>1.76</b>	
<b>Zone 14</b>																				
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>Zone 15</b>																				
Kingswood	0.00	0.05	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.06	0.11	0.06	0.41	0.32	0.00	0.00	0.07	1.15	
Other stores, survey zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Sub-total</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.07</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.11</b>	<b>0.06</b>	<b>0.41</b>	<b>0.32</b>	<b>0.00</b>	<b>0.00</b>	<b>0.07</b>	<b>1.15</b>	
<b>Zone 16</b>																				
Longwell Green Retail Park, Longwell Green	0.00	0.00	0.25	0.00	0.00	0.15	0.86	0.40	0.00	0.07	0.00	0.34	0.57	1.46	1.34	1.11	1.58	0.63	9.16	
Other stores, survey zone 16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.06	0.00	0.19	0.00	0.34	
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.25</b>	<b>0.00</b>	<b>0.00</b>	<b>0.15</b>	<b>0.86</b>	<b>0.40</b>	<b>0.00</b>	<b>0.07</b>	<b>0.00</b>	<b>0.34</b>	<b>0.57</b>	<b>1.55</b>	<b>1.40</b>	<b>1.11</b>	<b>1.77</b>	<b>0.63</b>	<b>9.49</b>	



# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 6f - DIY and Decorating Goods: Spending Patterns in 2009 (in £m) Across the Study Area Zones: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	TOTAL	
<b>Total Expenditure: DIY and Decorating Goods 2009 (£m)</b>	<b>9.56</b>	<b>4.21</b>	<b>12.27</b>	<b>4.13</b>	<b>7.01</b>	<b>8.36</b>	<b>7.27</b>	<b>3.14</b>	<b>7.73</b>	<b>8.98</b>	<b>12.83</b>	<b>8.86</b>	<b>6.58</b>	<b>9.58</b>	<b>8.58</b>	<b>8.55</b>	<b>10.07</b>	<b>8.28</b>	<b>145.98</b>	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	
<b>1. Stores within OCA</b>																				
<b>Zone 1</b>																				
Thornbury	0.88	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.02
Other stores, survey zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.88</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.09</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.02</b>
<b>Zone 2</b>																				
Other stores, survey zone 2	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72
<b>Sub-total</b>	<b>0.00</b>	<b>0.72</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.72</b>
<b>Zone 3</b>																				
B&Q, Yate, Station Rd, Yate	1.32	1.78	9.19	2.69	0.04	3.81	0.50	0.43	0.00	0.05	0.00	0.15	0.11	0.05	0.00	0.00	0.00	0.00	0.00	20.14
Yate	0.33	0.26	0.64	0.79	0.00	0.69	0.00	0.05	0.00	0.00	0.00	0.21	0.05	0.00	0.00	0.00	0.00	0.00	0.00	3.02
Other stores, survey zone 3	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09
<b>Sub-total</b>	<b>1.65</b>	<b>2.03</b>	<b>9.92</b>	<b>3.49</b>	<b>0.04</b>	<b>4.50</b>	<b>0.50</b>	<b>0.48</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.36</b>	<b>0.16</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>23.25</b>
<b>Zone 4</b>																				
Other stores, survey zone 4	0.00	0.00	0.00	0.10	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.10</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.16</b>
<b>Zone 5</b>																				
Cribbs Causeway Retail Park, Lysander Rd, Patchway	4.94	0.53	0.37	0.05	5.80	0.54	0.31	0.00	5.43	1.42	6.24	0.20	0.10	0.23	0.00	0.09	0.04	0.00	0.00	26.29
The Mall at Cribbs Causeway, Patchway	0.59	0.00	0.00	0.00	0.31	0.11	0.07	0.00	0.08	0.11	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.37
Other stores, survey zone 5	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09
<b>Sub-total</b>	<b>5.53</b>	<b>0.53</b>	<b>0.37</b>	<b>0.05</b>	<b>6.16</b>	<b>0.65</b>	<b>0.38</b>	<b>0.00</b>	<b>5.52</b>	<b>1.58</b>	<b>6.34</b>	<b>0.20</b>	<b>0.10</b>	<b>0.23</b>	<b>0.00</b>	<b>0.09</b>	<b>0.04</b>	<b>0.00</b>	<b>0.00</b>	<b>27.76</b>
<b>Zone 6</b>																				
Other stores, survey zone 6	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.32
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.32</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.32</b>
<b>Zone 7</b>																				
Other stores, survey zone 7	0.00	0.05	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05	0.10	0.00	0.00	0.00	0.04	0.00	0.00	0.29
<b>Sub-total</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.10</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.04</b>	<b>0.00</b>	<b>0.00</b>	<b>0.29</b>
<b>Zone 8</b>																				
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 9</b>																				
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.10</b>
<b>Zone 10</b>																				
Filton	0.18	0.00	0.09	0.10	0.09	1.03	0.24	0.00	0.14	1.47	0.97	1.35	0.16	0.00	0.00	0.00	0.32	0.00	0.00	6.15
Other stores, survey zone 10	0.00	0.00	0.18	0.00	0.05	0.00	0.00	0.00	0.05	0.27	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.61
<b>Sub-total</b>	<b>0.18</b>	<b>0.00</b>	<b>0.28</b>	<b>0.10</b>	<b>0.14</b>	<b>1.03</b>	<b>0.24</b>	<b>0.00</b>	<b>0.14</b>	<b>1.75</b>	<b>1.08</b>	<b>1.35</b>	<b>0.16</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.32</b>	<b>0.00</b>	<b>0.00</b>	<b>6.76</b>
<b>Zone 11</b>																				
B&Q Warehouse, Stoke Gifford, Filton Branch: Foxden Road, Stoke Gifford	0.57	0.11	0.18	0.05	0.05	0.26	0.13	0.00	0.62	2.09	4.55	0.41	0.10	0.00	0.09	0.00	0.04	0.00	0.00	9.26
Other stores, survey zone 11	0.00	0.00	0.00	0.00	0.05	0.11	0.00	0.00	0.00	0.11	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.31
<b>Sub-total</b>	<b>0.57</b>	<b>0.11</b>	<b>0.18</b>	<b>0.05</b>	<b>0.09</b>	<b>0.36</b>	<b>0.13</b>	<b>0.00</b>	<b>0.62</b>	<b>2.21</b>	<b>4.60</b>	<b>0.41</b>	<b>0.10</b>	<b>0.00</b>	<b>0.09</b>	<b>0.00</b>	<b>0.04</b>	<b>0.00</b>	<b>0.00</b>	<b>9.57</b>
<b>Zone 12</b>																				
Other stores, survey zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>	<b>0.00</b>	<b>0.10</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.16</b>
<b>Zone 13</b>																				
Other stores, survey zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.11
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.05</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.11</b>
<b>Zone 14</b>																				
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 15</b>																				
Kingswood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.16	0.10	0.15	0.69	0.00	0.00	0.05	0.00	1.21
Other stores, survey zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>0.16</b>	<b>0.10</b>	<b>0.15</b>	<b>0.69</b>	<b>0.00</b>	<b>0.00</b>	<b>0.05</b>	<b>0.00</b>	<b>1.21</b>
<b>Zone 16</b>																				
Longwell Green Retail Park, Longwell Green	0.04																			

# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 6g - Domestic Appliance: Spending Patterns in 2009 as a Percentage Across the Study Area Zones: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
<b>1. Stores within OCA</b>																			
<b>Zone 1</b>																			
Other stores, survey zone 1	2.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18
<b>Sub-total</b>	<b>2.78</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.18</b>
<b>Zone 2</b>																			
Wotton-under-Edge	0.00	4.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12
Other stores, survey zone 2	0.00	1.04	3.40	3.38	0.00	0.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48
<b>Sub-total</b>	<b>0.00</b>	<b>4.17</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.12</b>
<b>Zone 3</b>																			
Yate	0.46	6.25	16.92	15.52	0.00	5.29	1.19	3.18	0.00	1.34	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.00	2.64
Other stores, survey zone 3	0.00	1.04	3.40	3.38	0.00	0.59	0.00	0.00	0.00	0.00	0.00	0.51	0.00	0.00	0.00	0.00	0.00	0.00	0.48
<b>Sub-total</b>	<b>0.46</b>	<b>7.29</b>	<b>20.32</b>	<b>18.90</b>	<b>0.00</b>	<b>5.88</b>	<b>1.19</b>	<b>3.18</b>	<b>0.00</b>	<b>1.34</b>	<b>0.00</b>	<b>1.19</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3.12</b>
<b>Zone 4</b>																			
Other stores, survey zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.79</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.04</b>
<b>Zone 5</b>																			
Asda Wal-Mart Supercentre, Highwood Lane Patchway	0.00	2.08	1.67	0.00	5.36	0.00	0.00	0.00	1.21	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60
The Mall at Cribbs Causeway, Patchway	12.79	10.42	8.64	4.19	4.14	11.03	10.32	3.18	2.80	21.49	9.03	5.94	6.55	1.20	1.16	3.69	5.84	3.11	7.27
Cribbs Causeway Retail Park, Lysander Rd, Patchway	56.26	28.65	39.60	27.90	77.33	41.18	17.06	15.91	67.19	43.96	60.36	16.95	7.01	15.03	9.81	8.92	8.48	3.87	31.80
Other stores, survey zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	0.06
<b>Sub-total</b>	<b>69.04</b>	<b>41.15</b>	<b>49.90</b>	<b>32.10</b>	<b>86.83</b>	<b>52.21</b>	<b>27.38</b>	<b>19.09</b>	<b>71.88</b>	<b>66.80</b>	<b>69.39</b>	<b>22.89</b>	<b>13.56</b>	<b>16.22</b>	<b>10.97</b>	<b>12.81</b>	<b>14.73</b>	<b>6.98</b>	<b>39.73</b>
<b>Zone 6</b>																			
Other stores, survey zone 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 7</b>																			
Emerson Green	0.00	0.00	0.67	0.00	0.00	2.65	3.57	6.52	0.00	1.15	0.00	7.97	10.50	9.91	3.34	1.23	4.39	1.76	2.85
Other stores, survey zone 7	0.00	0.00	0.00	1.19	0.00	0.00	0.79	1.52	0.00	0.00	0.00	0.68	0.00	0.51	1.82	0.52	0.00	0.76	0.36
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.67</b>	<b>1.19</b>	<b>0.00</b>	<b>2.65</b>	<b>4.37</b>	<b>8.03</b>	<b>0.00</b>	<b>1.15</b>	<b>0.00</b>	<b>8.65</b>	<b>10.50</b>	<b>10.42</b>	<b>5.16</b>	<b>1.75</b>	<b>4.39</b>	<b>2.52</b>	<b>3.21</b>
<b>Zone 8</b>																			
Other stores, survey zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 9</b>																			
Other stores, survey zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.21</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.06</b>
<b>Zone 10</b>																			
Other stores, survey zone 10	1.04	0.00	1.00	1.00	0.66	1.47	1.98	0.00	0.00	1.15	2.49	1.19	0.70	0.51	0.66	0.52	0.47	0.00	0.93
<b>Sub-total</b>	<b>1.04</b>	<b>0.00</b>	<b>1.00</b>	<b>1.00</b>	<b>0.66</b>	<b>1.47</b>	<b>1.98</b>	<b>0.00</b>	<b>0.00</b>	<b>1.15</b>	<b>2.49</b>	<b>1.19</b>	<b>0.70</b>	<b>0.51</b>	<b>0.66</b>	<b>0.52</b>	<b>0.47</b>	<b>0.00</b>	<b>0.93</b>
<b>Zone 11</b>																			
Tesco, Brook Way Bradley Stoke	0.58	0.00	0.00	0.00	0.00	0.74	0.00	0.00	0.00	0.57	3.31	0.00	0.00	0.00	0.51	0.52	0.00	0.00	0.48
Other stores, survey zone 11	0.00	0.00	0.00	1.19	0.00	1.18	0.00	0.00	0.00	2.49	1.22	0.68	0.00	0.00	0.66	0.00	0.00	0.00	0.44
<b>Sub-total</b>	<b>0.58</b>	<b>0.00</b>	<b>0.00</b>	<b>1.19</b>	<b>0.00</b>	<b>1.91</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3.07</b>	<b>4.54</b>	<b>0.68</b>	<b>0.00</b>	<b>0.00</b>	<b>1.16</b>	<b>0.52</b>	<b>0.00</b>	<b>0.00</b>	<b>0.92</b>
<b>Zone 12</b>																			
Other stores, survey zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.21	0.00	0.00	0.00	0.00	0.00	0.00	0.13
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>2.21</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.13</b>
<b>Zone 13</b>																			
Other stores, survey zone 13	0.00	0.00	0.00	0.00	0.00	0.00	1.59	0.00	0.00	0.00	1.62	1.19	8.42	3.22	2.83	0.00	0.47	0.00	1.08
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.59</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.62</b>	<b>1.19</b>	<b>8.42</b>	<b>3.22</b>	<b>2.83</b>	<b>0.00</b>	<b>0.47</b>	<b>0.00</b>	<b>1.08</b>
<b>Zone 14</b>																			
Other stores, survey zone 14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Zone 15</b>																			
Other stores, survey zone 15	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.53	0.00	0.00	0.00	1.87	1.89	1.82	0.00	1.70	0.00	0.49
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.53</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.87</b>	<b>1.89</b>	<b>1.82</b>	<b>0.00</b>	<b>1.70</b>	<b>0.00</b>	<b>0.49</b>
<b>Zone 16</b>																			
Longwell Green Retail Park, Longwell Green	0.58	0.00	4.07	6.57	0.00	5.00	20.63	30.00	0.00	0.00	0.39	7.97	30.58	20.83	39.08	28.40	41.12	37.51	14.67
Other stores, survey zone 16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.47	0.00	0.06
<b>Sub-total</b>	<b>0.58</b>	<b>0.00</b>	<b>4.07</b>	<b>6.57</b>	<b>0.00</b>	<b>5.00</b>	<b>20.63</b>	<b>30.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.39</b>	<b>7.97</b>	<b>30.58</b>	<b>20.83</b>	<b>39.08</b>	<b>28.92</b>	<b>41.58</b>	<b>37.51</b>	<b>14.73</b>
<b>Zone 17</b>																			
Other stores, survey zone 17	0.00	0.00	0.00	1.19	0.00	0.00	1.19	0.00	0.00	0.57	0.00	0.00	0.70	0.51	1.97	1.23	2.52	0.59	0.59
<b>Sub-total</b>																			







## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 7 - Comparison Goods Capacity Summary Retention rate at 59%: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	<b>2009</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>Change 2009-11</b>	<b>Change 2011-16</b>	<b>Change 2016-21</b>	<b>Change 2021-26</b>	<b>Change 2009-26</b>
A) Total Population	372,881	377,402	393,750	418,480	442,922	4,521	16,348	24,730	24,442	<b>70,041</b>
B) Total Expenditure £m	1,303.8	1,367.3	1,559.3	2,204.2	2,874.9	63.5	192.1	644.8	670.7	<b>1571.1</b>
C) Retained Expenditure £m <sup>1</sup>	770.5	808.1	921.6	1302.6	1699.0	37.5	113.5	381.1	396.4	<b>928.5</b>
D) Retained Expenditure %	59.1%	59.1%	59.1%	59.1%	59.1%					
E) Leakage £m	533.3	559.2	637.8	901.5	1175.8	26.0	78.6	263.7	274.3	<b>642.6</b>
<b>Claims on Expenditure</b>										
G) Existing Traders including turnover growth £m <sup>2</sup>	770.5	781.0	808.0	900.8	975.2	10.5	26.9	92.9	74.4	<b>204.7</b>
H) Commitments <sup>3</sup>	0.0	119.1	123.2	137.4	148.7	119.1	4.1	14.2	11.3	<b>148.7</b>
<b>Impact on capacity £m</b>	770.5	900.1	931.1	1038.2	1123.9	129.6	31.0	107.0	85.8	<b>353.4</b>
<b>SUMMARY</b>						<b>2009-11</b>	<b>2011-16</b>	<b>2016-21</b>	<b>2021-26</b>	<b>2009-26</b>
Initial surplus £m						37.5	113.5	381.1	396.4	928.5
Claims on capacity £m						129.6	31.0	107.0	85.8	353.4
<b>I) RESIDUAL £m<sup>4</sup></b>						<b>-92.1</b>	<b>82.5</b>	<b>274.1</b>	<b>310.6</b>	<b>575.1</b>
Turnover per sq m (assumed)	6,082					6,165	6,377	7,111	7,698	
<b>J) Floorspace Requirement sq m (net)<sup>5</sup></b>						<b>-14,935</b>	<b>12,934</b>	<b>38,542</b>	<b>40,351</b>	<b>76,891</b>
K) Floorspace Requirement sq m (gross)						-21,336	18,476	55,060	57,644	109,844

#### NOTES:

(1) Study area expenditure retention - this is the product of the current market share of the study area centres (the cumulative share of the centres within the study area) and the total study area expenditure. The market share remains constant for each of the forecast years.

(2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by as follows: 2009-2016 at 0.68% per annum, 2016-2021 at 2.2% per annum and 2021-2026 at 1.6% per annum. Sourced from Experian.

(3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 3 above to account for growth in sales density.

(4) Residual - the product of the total available expenditure minus the deductions for the existing centres turnover and commitments.

(5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £6,000/sqm in 2009, which is forecast to increase as per the rates in note 3 until 2026. 70% net to gross ratio assumed.



## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 8 - Population Projections: Scenario 1 (lower growth: Draft RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	All Zones Total
Population 2006	24,049	10,356	31,942	10,029	17,838	19,972	16,772	7,705	21,289	22,555	31,362	22,229	16,695	24,651	21,424	21,449	25,852	19,718	<b>365,887</b>
Population 2009	23,962	10,513	31,733	9,934	18,195	20,445	17,525	7,920	22,243	23,377	31,544	22,729	16,913	25,755	22,067	22,110	25,611	20,303	<b>372,881</b>
Population 2011	23,904	10,616	31,594	9,871	18,429	20,754	18,009	8,060	22,855	23,909	31,664	23,056	17,058	26,465	22,486	22,539	25,450	20,684	<b>377,402</b>
Population 2016	23,592	10,713	31,201	9,787	22,104	24,234	19,351	9,656	24,344	24,762	32,048	23,717	17,062	28,188	23,131	23,445	24,922	21,492	<b>393,750</b>
Population 2021	23,432	10,801	30,886	9,781	22,690	26,149	23,163	10,594	25,702	25,619	31,551	24,395	17,040	29,761	23,246	24,133	25,713	22,301	<b>406,959</b>
Population 2026	23,425	10,908	30,774	9,837	22,636	30,535	26,027	10,586	26,957	26,480	31,268	25,085	17,125	31,215	23,404	24,831	27,191	23,177	<b>421,462</b>
<b>Change in population 2009 - 2011</b>																			
Numeric change	-58	103	-140	-64	234	309	484	140	613	532	121	327	144	709	418	429	-162	381	4,521
Percentage change	-0.2%	1.0%	-0.4%	-0.6%	1.3%	1.5%	2.9%	1.8%	2.9%	2.4%	0.4%	1.5%	0.9%	2.9%	2.0%	2.0%	-0.6%	1.9%	1.2%
<b>Change in population 2011 - 2016</b>																			
Numeric change	-313	97	-392	-84	3,675	3,480	1,342	1,597	1,488	853	383	661	5	1,723	646	906	-528	808	16,348
Percentage change	-1.3%	0.9%	-1.2%	-0.8%	19.9%	16.8%	7.5%	19.8%	6.5%	3.6%	1.2%	2.9%	0.0%	6.5%	2.9%	4.0%	-2.1%	3.9%	4.3%
<b>Change in population 2016 - 2021</b>																			
Numeric change	-159	88	-315	-6	586	1,915	3,812	938	1,359	857	-496	678	-23	1,573	114	688	791	808	13,209
Percentage change	-0.7%	0.8%	-1.0%	-0.1%	2.7%	7.9%	19.7%	9.7%	5.6%	3.5%	-1.5%	2.9%	-0.1%	5.6%	0.5%	2.9%	3.2%	3.8%	3.4%
<b>Change in population 2021 - 2026</b>																			
Numeric change	-8	107	-112	56	-54	4,386	2,864	-8	1,255	861	-284	690	85	1,453	159	698	1,478	876	14,503
Percentage change	0.0%	1.0%	-0.4%	0.6%	-0.2%	16.8%	12.4%	-0.1%	4.9%	3.4%	-0.9%	2.8%	0.5%	4.9%	0.7%	2.9%	5.7%	3.9%	3.6%
<b>Change in population 2008 - 2026</b>																			
Numeric change	-538	395	-959	-97	4,441	10,090	8,502	2,666	4,715	3,102	-276	2,356	211	5,459	1,337	2,721	1,580	2,873	48,581
Percentage change	-2.2%	3.8%	-3.0%	-1.0%	24.9%	50.5%	50.7%	34.6%	22.1%	13.8%	-0.9%	10.6%	1.3%	22.1%	6.2%	12.7%	6.1%	14.6%	13.3%

**NOTES:**

(1) Population base data was sourced from ONS Mid-year Population Estimates 2006.

(2) The individual zone populations for 2011, 2016, 2021 and 2026 have been populated by South Gloucestershire Council using information available in relation to committed development and know locations for future growth and an assumed factor for decreasing household size. These figures match the lower growth scenario concurrent with the Draft RSS submission housing targets.

(3) For areas outside of the South Gloucestershire boundary specific growth figures were provided by Gloucestershire County Council however standard district wide population projections (ONS 2006 Sub-national Population Projections) have been used for areas in Bristol and Bath and North East Somerset.

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 9 - Total Comparison Goods Expenditure & Expenditure Growth: Scenario 1 (lower growth: Draft RSS)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	All Zones Total	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total 2009 (including SFT)	85.70	37.75	111.15	36.83	62.14	73.65	66.61	28.09	67.76	78.84	119.96	77.65	57.59	85.07	75.49	75.73	90.77	72.98		1,303.78
Deduction for SFT in 2009 (based on survey results)	9.70	4.27	12.57	4.17	7.03	8.33	7.54	3.18	7.67	8.92	13.57	8.78	6.52	9.62	8.54	8.57	10.27	8.26		147.49
<b>Total 2009 (excluding SFT)</b>	<b>76.01</b>	<b>33.48</b>	<b>98.58</b>	<b>32.67</b>	<b>55.11</b>	<b>65.32</b>	<b>59.07</b>	<b>24.92</b>	<b>60.10</b>	<b>69.92</b>	<b>106.39</b>	<b>68.87</b>	<b>51.08</b>	<b>75.45</b>	<b>66.95</b>	<b>67.17</b>	<b>80.50</b>	<b>64.72</b>		<b>1,156.29</b>
Total 2011 (including SFT)	88.61	39.51	114.69	37.93	65.23	77.49	70.94	29.63	72.17	83.57	124.80	81.64	60.20	90.60	79.72	80.02	93.48	77.06		1,367.29
Deduction for SFT in 2011 of 11.8%	10.46	4.66	13.53	4.48	7.70	9.14	8.37	3.50	8.52	9.86	14.73	9.63	7.10	10.69	9.41	9.44	11.03	9.09		161.34
<b>Total 2011 (excluding SFT)</b>	<b>78.15</b>	<b>34.85</b>	<b>101.16</b>	<b>33.45</b>	<b>57.53</b>	<b>68.34</b>	<b>62.57</b>	<b>26.14</b>	<b>63.65</b>	<b>73.71</b>	<b>110.08</b>	<b>72.00</b>	<b>53.10</b>	<b>79.91</b>	<b>70.31</b>	<b>70.57</b>	<b>82.45</b>	<b>67.96</b>		<b>1,205.95</b>
Total 2016 (including SFT)	95.63	43.60	123.87	41.13	85.56	98.95	83.36	38.82	84.06	94.65	138.13	91.84	65.85	105.53	89.68	91.02	100.11	87.56		1,559.35
Deduction for SFT in 2016 of 12.5%	11.95	5.45	15.48	5.14	10.70	12.37	10.42	4.85	10.51	11.83	17.27	11.48	8.23	13.19	11.21	11.38	12.51	10.94		194.92
<b>Total 2016 (excluding SFT)</b>	<b>83.68</b>	<b>38.15</b>	<b>108.38</b>	<b>35.99</b>	<b>74.87</b>	<b>86.58</b>	<b>72.94</b>	<b>33.97</b>	<b>73.55</b>	<b>82.82</b>	<b>120.87</b>	<b>80.36</b>	<b>57.62</b>	<b>92.34</b>	<b>78.47</b>	<b>79.64</b>	<b>87.59</b>	<b>76.61</b>		<b>1,364.43</b>
Total 2021 (including SFT)	126.22	58.42	162.93	54.62	116.71	141.87	132.58	56.60	117.93	130.13	180.71	125.52	87.38	148.05	119.76	124.50	137.24	120.72		2,141.88
Deduction for SFT in 2021 of 12.5%	15.78	7.30	20.37	6.83	14.59	17.73	16.57	7.07	14.74	16.27	22.59	15.69	10.92	18.51	14.97	15.56	17.16	15.09		267.73
<b>Total 2021 (excluding SFT)</b>	<b>110.44</b>	<b>51.11</b>	<b>142.56</b>	<b>47.79</b>	<b>102.12</b>	<b>124.13</b>	<b>116.01</b>	<b>49.52</b>	<b>103.19</b>	<b>113.86</b>	<b>158.12</b>	<b>109.83</b>	<b>76.46</b>	<b>129.55</b>	<b>104.79</b>	<b>108.93</b>	<b>120.09</b>	<b>105.63</b>		<b>1,874.14</b>
Total 2026 (including SFT)	155.37	72.64	199.89	67.64	143.36	203.99	183.44	69.64	152.30	165.62	220.51	158.93	108.14	191.21	148.47	157.73	178.71	154.49		2,732.08
Deduction for SFT in 2026 of 12.5%	19.42	9.08	24.99	8.45	17.92	25.50	22.93	8.71	19.04	20.70	27.56	19.87	13.52	23.90	18.56	19.72	22.34	19.31		341.51
<b>Total 2026 (excluding SFT)</b>	<b>135.95</b>	<b>63.56</b>	<b>174.91</b>	<b>59.18</b>	<b>125.44</b>	<b>178.49</b>	<b>160.51</b>	<b>60.94</b>	<b>133.27</b>	<b>144.91</b>	<b>192.95</b>	<b>139.06</b>	<b>94.62</b>	<b>167.31</b>	<b>129.91</b>	<b>138.01</b>	<b>156.37</b>	<b>135.18</b>		<b>2,390.57</b>
Growth in total expenditure 2009 - 2011	2.15	1.37	2.58	0.79	2.42	3.03	3.50	1.22	3.55	3.79	3.69	3.14	2.02	4.46	3.37	3.41	1.95	3.24		<b>49.66</b>
Growth in total expenditure 2011 - 2016	5.53	3.30	7.22	2.53	17.33	18.23	10.37	7.84	9.90	9.11	10.79	8.35	4.52	12.43	8.16	9.07	5.14	8.65		<b>158.48</b>
Growth in total expenditure 2016 - 2021	26.76	12.96	34.18	11.80	27.25	37.56	43.07	15.55	29.64	31.04	37.25	29.47	18.84	37.21	26.32	29.29	32.50	29.02		<b>509.71</b>
Growth in total expenditure 2021 - 2026	25.51	12.45	32.34	11.39	23.33	54.35	44.50	11.41	30.08	31.05	34.83	29.23	18.16	37.76	25.12	29.08	36.28	29.55		<b>516.43</b>
<b>Growth 2009 - 2026</b>	<b>59.94</b>	<b>30.08</b>	<b>76.33</b>	<b>26.52</b>	<b>70.33</b>	<b>113.17</b>	<b>101.44</b>	<b>36.02</b>	<b>73.17</b>	<b>74.99</b>	<b>86.56</b>	<b>70.20</b>	<b>43.54</b>	<b>91.86</b>	<b>62.96</b>	<b>70.85</b>	<b>75.87</b>	<b>70.46</b>		<b>1,234.29</b>

**NOTES:**

(1) The figures in the above table are the products of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).

(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure in 2009 using the study wide average SFT market share of 11.31% derived from the telephone survey of households.

We have grown the expenditure for SFT to an average of 11.8% in all zones by 2011 and from 2016 onwards we use the rate of 12.5% across all zones. There is a lack of data to forecast beyond 2016, and so we assume spending on SFT will level off, remaining at 12.5% in 2021 and 2026.

All monetary values are held constant at 2006 prices.

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 10 - Comparison Goods Capacity Summary Retention rate at 59%: Scenario 1 (lower growth: Draft RSS)

	<u>2009</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>Change 2009-11</u>	<u>Change 2011-16</u>	<u>Change 2016-21</u>	<u>Change 2021-26</u>	<u>Change 2009-26</u>
A) Total Population	372,881	377,402	393,750	406,959	421,462	4,521	16,348	13,209	14,503	<b>48,581</b>
B) Total Expenditure £m	1,303.8	1,367.3	1,559.3	2,141.9	2,732.1	63.5	192.1	582.5	590.2	<b>1428.3</b>
C) Retained Expenditure £m <sup>1</sup>	770.5	808.1	921.6	1265.8	1614.6	37.5	113.5	344.3	348.8	<b>844.1</b>
D) Retained Expenditure %	59.10%	59.10%	59.10%	59.10%	59.10%					
E) Leakage £m	533.3	559.2	637.8	876.0	1117.4	26.0	78.6	238.3	241.4	<b>584.2</b>
<b>Claims on Expenditure</b>										
G) Existing Traders including turnover growth £m <sup>2</sup>	770.5	781.0	808.0	900.8	975.2	10.5	26.9	92.9	74.4	<b>204.7</b>
H) Commitments <sup>3</sup>	0.0	119.1	123.2	137.4	148.7	119.1	4.1	14.2	11.3	<b>148.7</b>
<b>Impact on capacity £m</b>	<b>770.5</b>	<b>900.1</b>	<b>931.1</b>	<b>1038.2</b>	<b>1123.9</b>	<b>129.6</b>	<b>31.0</b>	<b>107.0</b>	<b>85.8</b>	<b>353.4</b>
<b>SUMMARY</b>						<b>2009-11</b>	<b>2011-16</b>	<b>2016-21</b>	<b>2021-26</b>	<b>2009-26</b>
Initial surplus £m						37.5	113.5	344.3	348.8	844.1
Claims on capacity £m						129.6	31.0	107.0	85.8	353.4
<b>I) RESIDUAL £m <sup>4</sup></b>						<b>-92.1</b>	<b>82.5</b>	<b>237.2</b>	<b>263.1</b>	<b>490.7</b>
Turnover per sq m (assumed)	6,082					6,165	6,377	7,111	7,698	
<b>J) Floorspace Requirement sq m (net) <sup>5</sup></b>						<b>-14,935</b>	<b>12,934</b>	<b>33,364</b>	<b>34,172</b>	<b>65,534</b>
K) Floorspace Requirement sq m (gross)						-21,336	18,476	47,663	48,817	93,621

#### NOTES:

(1) Study area expenditure retention - this is the product of the current market share of the study area centres (the cumulative share of the centres within the study area) and the total study area expenditure. The market share remains constant for each of the forecast years.

(2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by as follows: 2009-2016 at 0.68% per annum, 2016-2021 at 2.2% per annum and 2021-2026 at 1.6% per annum. Sourced from Experian.

(3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 3 above to account for growth in sales density.

(4) Residual - the product of the total available expenditure minus the deductions for the existing centres turnover and commitments.

(5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £6,000/sqm in 2009, which is forecast to increase as per the rates in note 3 until 2026. 70% net to gross ratio assumed.



## SECTION 2

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### Convenience Goods



## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 11 - Convenience Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£
<b>2006</b>	1,664	1,664	1,643	1,730	1,636	1,699	1,721	1,668	1,503	1,630	1,697	1,636	1,647	1,599	1,653	1,635	1,659	1,699
<b>2009</b>	1,742	1,742	1,720	1,811	1,713	1,779	1,802	1,746	1,573	1,706	1,777	1,713	1,724	1,674	1,731	1,712	1,737	1,779
<b>2011</b>	1,750	1,750	1,728	1,819	1,721	1,787	1,810	1,754	1,581	1,714	1,785	1,721	1,732	1,682	1,738	1,720	1,745	1,787
<b>2016</b>	1,770	1,770	1,748	1,840	1,740	1,807	1,831	1,775	1,599	1,734	1,805	1,740	1,752	1,701	1,759	1,739	1,765	1,807
<b>2021</b>	1,847	1,847	1,823	1,920	1,816	1,886	1,910	1,851	1,668	1,809	1,883	1,816	1,828	1,775	1,835	1,815	1,841	1,886
<b>2026</b>	1,889	1,889	1,865	1,964	1,857	1,928	1,953	1,893	1,706	1,850	1,926	1,857	1,869	1,815	1,876	1,856	1,883	1,928

**NOTES:**

(1) Expenditure data derived from MapInfo 2006 per capita annual comparison goods expenditure estimates, which we have obtained through our in-house GIS system.

(2) The 2006 MapInfo expenditure data has been projected forward to the base year of the study (2009). To do this we use an actual growth rate in convenience spend of 2.2% between 2006 and 2008 (sourced from the Oxford Economics Retail Briefings Update, Revised Version March 2009) and then one year of forecast growth at 0.23% per annum, which is the mid-point forecast growth figure for the 2008-2016 period given by MapInfo and Experian. Source: MapInfo Retail Spending Outlook Revised Version, March 2009 and the Experian Retail Planner Briefing Note 6.1 February 2009 Changes - Table 3.

(3) Expenditure for 2009 to 2016: Uses a growth rate of 0.23% per annum. This is derived from the mid-point forecast growth rate for 2008-2016 given by MapInfo and Experian. Source: MapInfo, Retail Spending Outlook Revised Version March 2009 and Experian Retail Planner Briefing Note 6.1 February 2009 Changes, Table 3.

(4) Expenditure growth for 2016-2021: Uses a growth rate of 0.85% per annum. This is derived from the mid-point medium term past trends in retail expenditure growth given by MapInfo and Experian. Source: MapInfo Brief 08/02, medium term past trend, Table 3 and Experian Retail Planner Briefing Note 6.1, medium term past trend, Table 3.2.

(5) Expenditure growth for 2021-2026: Uses a growth rate of 0.45% per annum. Derived from the mid-point ultra long term past trends given by MapInfo and Experian. Source: MapInfo Brief 08/02, ultra long term past trend, Table 3 and Experian Retail Planner Briefing Note 6.1, ultra long term past trend, Table 3.2.

All monetary values are held constant at 2006 prices.

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 12 - Total Convenience Goods Expenditure & Expenditure Growth: Scenario 2 (higher growth: SOS Proposed Changes RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	All Zones Total
Year	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total 2009 (including SFT)	41.74	18.31	54.58	17.99	31.16	36.36	31.57	13.83	35.00	39.89	56.04	38.93	29.16	43.11	38.19	37.84	44.48	36.11	644.32
Deduction for SFT in 2009 (based on survey results)	0.70	0.31	0.91	0.30	0.52	0.61	0.53	0.23	0.59	0.67	0.94	0.65	0.49	0.72	0.64	0.63	0.74	0.60	10.79
<b>Total 2009 (excluding SFT)</b>	<b>41.04</b>	<b>18.01</b>	<b>53.67</b>	<b>17.69</b>	<b>30.64</b>	<b>35.76</b>	<b>31.05</b>	<b>13.60</b>	<b>34.41</b>	<b>39.22</b>	<b>55.10</b>	<b>38.28</b>	<b>28.67</b>	<b>42.39</b>	<b>37.55</b>	<b>37.21</b>	<b>43.74</b>	<b>35.51</b>	<b>633.53</b>
Total 2011 (including SFT)	41.83	18.58	54.59	17.96	31.71	37.08	32.60	14.14	36.13	40.99	56.51	39.67	29.55	44.50	39.09	38.76	44.40	36.96	655.05
Deduction for SFT in 2011 of 2.5%	1.05	0.46	1.36	0.45	0.79	0.93	0.81	0.35	0.90	1.02	1.41	0.99	0.74	1.11	0.98	0.97	1.11	0.92	16.38
<b>Total 2011 (excluding SFT)</b>	<b>40.79</b>	<b>18.11</b>	<b>53.23</b>	<b>17.51</b>	<b>30.92</b>	<b>36.16</b>	<b>31.78</b>	<b>13.79</b>	<b>35.22</b>	<b>39.96</b>	<b>55.10</b>	<b>38.68</b>	<b>28.81</b>	<b>43.39</b>	<b>38.11</b>	<b>37.79</b>	<b>43.29</b>	<b>36.03</b>	<b>638.68</b>
Total 2016 (including SFT)	41.76	18.96	54.54	18.01	38.47	43.80	35.43	17.14	38.92	42.94	57.86	41.28	29.90	47.95	40.68	40.78	43.99	38.85	691.26
Deduction for SFT in 2016 of 3.68%	1.54	0.70	2.01	0.66	1.42	1.61	1.30	0.63	1.43	1.58	2.13	1.52	1.10	1.76	1.50	1.50	1.62	1.43	25.44
<b>Total 2016 (excluding SFT)</b>	<b>40.23</b>	<b>18.27</b>	<b>52.53</b>	<b>17.35</b>	<b>37.06</b>	<b>42.19</b>	<b>34.13</b>	<b>16.50</b>	<b>37.49</b>	<b>41.36</b>	<b>55.73</b>	<b>39.76</b>	<b>28.80</b>	<b>46.19</b>	<b>39.18</b>	<b>39.28</b>	<b>42.37</b>	<b>37.42</b>	<b>665.82</b>
Total 2021 (including SFT)	43.27	19.95	62.38	18.78	41.80	50.26	50.37	19.61	42.87	46.95	60.05	44.90	31.75	52.82	43.26	44.40	51.32	42.05	766.79
Deduction for SFT in 2021 of 3.68%	1.59	0.73	2.30	0.69	1.54	1.85	1.85	0.72	1.58	1.73	2.21	1.65	1.17	1.94	1.59	1.63	1.89	1.55	28.22
<b>Total 2021 (excluding SFT)</b>	<b>41.68</b>	<b>19.21</b>	<b>60.08</b>	<b>18.09</b>	<b>40.26</b>	<b>48.41</b>	<b>48.52</b>	<b>18.89</b>	<b>41.30</b>	<b>45.22</b>	<b>57.84</b>	<b>43.25</b>	<b>30.59</b>	<b>50.87</b>	<b>41.66</b>	<b>42.76</b>	<b>49.43</b>	<b>40.50</b>	<b>738.57</b>
Total 2026 (including SFT)	46.19	20.60	69.64	19.32	43.36	56.36	63.35	20.04	45.99	50.31	61.60	47.90	33.34	56.65	45.25	47.40	58.32	44.69	830.32
Deduction for SFT in 2026 of 3.68%	1.70	0.76	2.56	0.71	1.60	2.07	2.33	0.74	1.69	1.85	2.27	1.76	1.23	2.08	1.67	1.74	2.15	1.64	30.56
<b>Total 2026 (excluding SFT)</b>	<b>44.49</b>	<b>19.84</b>	<b>67.08</b>	<b>18.61</b>	<b>41.76</b>	<b>54.29</b>	<b>61.02</b>	<b>19.30</b>	<b>44.30</b>	<b>48.46</b>	<b>59.33</b>	<b>46.14</b>	<b>32.12</b>	<b>54.57</b>	<b>43.58</b>	<b>45.66</b>	<b>56.17</b>	<b>43.05</b>	<b>799.77</b>
Growth in total expenditure 2008 - 2011	-0.26	0.11	-0.44	-0.18	0.28	0.40	0.73	0.19	0.81	0.74	0.00	0.40	0.13	1.00	0.57	0.58	-0.44	0.53	<b>5.14</b>
Growth in total expenditure 2011 - 2016	-0.56	0.15	-0.70	-0.16	6.14	6.03	2.34	2.72	2.27	1.40	0.63	1.08	-0.01	2.79	1.07	1.49	-0.93	1.38	<b>27.14</b>
Growth in total expenditure 2016 - 2021	1.46	0.95	7.55	0.74	3.21	6.22	14.40	2.39	3.80	3.86	2.11	3.49	4.69	2.48	3.48	7.06	3.09	<b>72.75</b>	
Growth in total expenditure 2021 - 2026	2.81	0.63	7.00	0.52	1.50	5.88	12.50	0.41	3.00	3.24	1.49	2.89	1.53	3.70	1.92	2.90	6.74	2.55	<b>61.20</b>
<b>Growth 2008 - 2026</b>	<b>3.45</b>	<b>1.84</b>	<b>13.41</b>	<b>0.91</b>	<b>11.12</b>	<b>18.53</b>	<b>29.98</b>	<b>5.71</b>	<b>9.88</b>	<b>9.23</b>	<b>4.23</b>	<b>7.86</b>	<b>3.44</b>	<b>12.18</b>	<b>6.03</b>	<b>8.45</b>	<b>12.43</b>	<b>7.54</b>	<b>166.23</b>

#### NOTES:

(1) The figures in the above table are the products of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 12 (per capita convenience goods expenditure), and are in millions of pounds (£m).

(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure in 2009 using the study wide average SFT market share of 1.67%, derived from the telephone survey of households. We have grown the expenditure for SFT to an average of 2.5% in all zones by 2011. For 2016 onwards we use a rate of 3.68% and apply this percentage across all zones.

All monetary values are held constant at 2006 prices.



# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 13a - Convenience Goods Spending Patterns in 2009 as a Percentage Across the Study Area Zones (including SFT)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %	Zone 12 %	Zone 13 %	Zone 14 %	Zone 15 %	Zone 16 %	Zone 17 %	Zone 18 %	TOTAL %
<b>1. Stores within OCA</b>																			
<b>Zone 1</b>																			
Tesco, Midland Way Thornbury	60.51	7.71	1.29	0.84	5.36	1.65	0.00	0.00	0.00	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.69
Aldi, Horseshoe Lane St. Mary's Centre Thornbury	8.94	0.82	0.00	0.00	0.00	0.23	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.63
Thornbury	3.38	0.00	0.16	0.24	1.13	0.00	0.00	0.00	0.00	0.23	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36
Other stores, survey zone 1	5.64	1.07	0.00	0.00	0.45	0.00	0.00	0.00	0.00	1.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48
<b>Sub-total</b>	<b>78.46</b>	<b>9.60</b>	<b>1.46</b>	<b>1.08</b>	<b>6.94</b>	<b>1.88</b>	<b>0.25</b>	<b>0.00</b>	<b>0.00</b>	<b>2.30</b>	<b>0.63</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>6.16</b>
<b>Zone 2</b>																			
Co-op, 38 Long Street Wotton-Under-Edge	0.68	30.09	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.27	0.00	0.25	1.28	0.00	0.00	0.00	1.01
Wotton Under Edge	0.34	3.77	0.01	0.12	0.00	0.00	0.00	0.00	0.00	0.04	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71
Other stores, survey zone 2	0.46	1.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08
<b>Sub-total</b>	<b>1.48</b>	<b>35.56</b>	<b>0.00</b>	<b>0.12</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.27</b>	<b>0.00</b>	<b>0.25</b>	<b>1.28</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.22</b>
<b>Zone 3</b>																			
Morrisons, Station Road, yate	3.11	12.47	36.91	28.24	0.82	14.56	0.79	5.70	0.00	0.00	0.00	0.00	0.00	0.80	0.00	0.27	0.00	0.00	5.56
Tesco, 12 East Walk, Yate Shopping Prct, Yate	1.00	10.99	42.17	46.61	0.00	14.32	0.79	6.20	0.81	0.26	0.00	1.60	0.00	0.00	0.00	0.00	0.00	0.00	6.39
Yate	0.00	0.47	2.90	0.84	0.00	0.25	0.17	0.00	0.00	0.23	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35
Other stores, survey zone 3	0.23	2.24	6.34	1.81	0.25	3.14	0.00	1.12	0.00	1.85	0.00	2.31	0.82	0.00	0.00	0.00	0.00	0.00	1.21
<b>Sub-total</b>	<b>4.34</b>	<b>26.18</b>	<b>88.02</b>	<b>77.60</b>	<b>1.07</b>	<b>31.24</b>	<b>1.75</b>	<b>13.01</b>	<b>0.81</b>	<b>2.34</b>	<b>0.32</b>	<b>3.91</b>	<b>0.82</b>	<b>0.80</b>	<b>0.00</b>	<b>0.27</b>	<b>0.00</b>	<b>0.00</b>	<b>13.51</b>
<b>Zone 4</b>																			
Clipping Sodbury	0.00	0.00	1.93	3.72	0.00	0.12	0.00	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28
Other stores, survey zone 4	0.00	0.00	0.00	6.46	0.00	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>1.93</b>	<b>10.18</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.25</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.47</b>
<b>Zone 5</b>																			
Adda Wal-Mart Supercentre, Highwood Lane, Patchway	3.33	0.00	0.00	0.00	50.34	0.00	0.79	0.00	33.70	5.82	6.46	0.00	0.82	0.00	0.80	0.00	0.00	0.00	5.57
Morrisons, Lysander Road Cribbs Causeway	4.81	1.64	0.81	0.00	12.84	0.00	0.00	0.00	11.36	6.08	4.66	0.00	1.06	0.00	0.00	0.00	0.00	0.00	2.52
Other stores, survey zone 5	0.11	0.00	0.00	0.84	5.45	0.82	1.04	0.61	1.01	0.00	1.33	0.00	0.27	0.82	0.25	0.23	0.00	0.23	0.68
<b>Sub-total</b>	<b>8.26</b>	<b>1.64</b>	<b>0.81</b>	<b>0.84</b>	<b>68.63</b>	<b>0.82</b>	<b>1.84</b>	<b>0.61</b>	<b>46.06</b>	<b>11.90</b>	<b>12.46</b>	<b>0.00</b>	<b>1.09</b>	<b>1.87</b>	<b>1.05</b>	<b>0.23</b>	<b>0.00</b>	<b>1.06</b>	<b>8.78</b>
<b>Zone 6</b>																			
Stop & Shop, 6 Dragon Road, Winterbourne	0.00	0.00	0.00	0.00	0.00	4.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Other stores, survey zone 6	0.00	0.00	0.00	0.12	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.12</b>	<b>0.00</b>	<b>15.30</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.96</b>
<b>Zone 7</b>																			
J Sainsbury, Emersons Green	0.78	0.82	2.43	6.39	0.00	8.99	56.05	35.28	0.00	0.00	0.78	22.49	25.37	2.69	12.60	10.38	12.26	4.78	9.70
Other stores, survey zone 7	0.00	0.00	0.00	0.00	0.00	0.95	1.87	0.74	0.00	0.00	0.00	0.00	0.82	0.00	0.00	0.00	1.24	0.00	0.28
<b>Sub-total</b>	<b>0.78</b>	<b>0.82</b>	<b>2.43</b>	<b>6.39</b>	<b>0.00</b>	<b>9.94</b>	<b>57.93</b>	<b>36.02</b>	<b>0.00</b>	<b>0.00</b>	<b>0.78</b>	<b>22.49</b>	<b>26.19</b>	<b>2.69</b>	<b>12.60</b>	<b>10.38</b>	<b>13.50</b>	<b>4.78</b>	<b>9.98</b>
<b>Zone 8</b>																			
Central Stores, High Street, Marshfield	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11
Other stores, survey zone 8	0.00	0.00	0.16	0.00	0.00	0.00	0.17	7.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.16</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.17</b>	<b>12.77</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.30</b>
<b>Zone 9</b>																			
Co-operative, Crow Lane, Henbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.11	0.26	0.00	0.00	0.00	0.00	0.00	0.45	0.00	0.00	0.00	0.37
loeland, 11-13 Amside Road, Southmead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.87	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38
Other stores, survey zone 9	0.00	0.00	0.00	0.00	1.07	0.00	0.00	7.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.07</b>	<b>0.00</b>	<b>0.00</b>	<b>18.82</b>	<b>1.32</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.45</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.26</b>
<b>Zone 10</b>																			
Filton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	2.03	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16
Other stores, survey zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	6.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.43</b>	<b>8.78</b>	<b>0.32</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.59</b>
<b>Zone 11</b>																			
Tesco, Brook Way, Bradley Stoke	1.55	0.82	0.81	0.00	0.54	11.98	0.79	0.00	0.81	10.05	42.58	0.80	1.09	0.00	0.00	0.00	0.00	0.00	5.84
J Sainsbury, Fox Den Road, Stoke Gifford	0.78	0.00	0.24	0.00	2.72	12.08	0.79	0.00	4.96	17.98	21.90	0.00	0.82	0.00	0.00	0.00	0.00	1.54	0.00
Tesco Express, Baileys Court Farm, Bradley Stoke	0.23	0.00	0.00	0.00	0.00	0.82	0.00	0.00	0.00	3.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34
Tesco Express, Bradley Pavilions Pear Tree Road, Bradley Stoke	0.00	0.00	0.00	0.00	0.00	1.29	0.00	0.00	0.00	4.45	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51
Tesco Express, Hatchell Lane, Stoke Gifford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28
Bradley Stoke	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05
Other stores, survey zone 11	0.00	0.00	0.00	0.00	3.00	1.06	0.00	0.00	0.79	3.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.55
<b>Sub-total</b>	<b>2.56</b>	<b>0.82</b>	<b>1.05</b>	<b>0.00</b>	<b>15.27</b>	<b>27.23</b>	<b>1.59</b>	<b>0.00</b>	<b>5.77</b>	<b>29.08</b>	<b>79.17</b>	<b>1.60</b>	<b>1.91</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.54</b>	<b>11.92</b>
<b>Zone 12</b>																			
Morrisons, 668-718 Fishponds Road, Fishponds	0.00	0.00	0.00	0.00	0.00	4.04	3.17	0.00	0.00	0.26	0.78	27.11	13.10	30.30	2.10	0.00	0.77	0.00	4.90
Somerfield, Willow Shopping Centre, Downend	0.00	0.00	0.00	0.12	0.00	0.50	8.19	0.31	0.00	0.00	0.00	18.84	0.00	0.80	0.00	0.00	0.27	0.00	1.97
Welcome (South West), 12 Straits Parade, Fishponds	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.00	0.00	0.00	3.15	0.27	0.24	0.00	0.00	0.00	0.00	0.23
Downend	0.00	0.00	0.00	0.00	0.00	0.00	1.33	0.00	0.00	0.00	0.00	1.09	0.37	0.00	0.17	0.00	0.00	0.00	0.16
Other stores, survey zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.12	0.00	0.00	0.00	0.45	1.45	0.00	0.00	0.00	0.00	0.00	0.12
<b>Sub-total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>5.54</b>	<b>13.36</b>	<b>0.43</b>	<b>0.00</b>	<b>0.26</b>	<b>0.78</b>	<b>50.64</b>	<b>21.18</b>	<b>30.55</b>	<b>2.91</b>	<b>0.17&lt;/</b>			



## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 14 - Summary of Capacity for Convenience Goods: Scenario 2 (higher growth: SOS Proposed Changes RSS) (Static Retention Rate)

	<b>2009</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>Change 2009-11</b>	<b>Change 2011-16</b>	<b>Change 2016-21</b>	<b>Change 2021-26</b>	<b>Change 2009-26</b>
A) Total Population (higher growth scenario)	372,881	377,402	393,750	418,480	442,922	4,521	16,348	24,730	24,442	<b>70,041</b>
B) Total Expenditure £m	644.32	655.05	691.26	766.79	830.32	10.7	36.2	75.5	63.5	<b>186.0</b>
C) Retained Expenditure £m <sup>1</sup>	553.6	562.8	594.0	658.9	713.4	9.2	31.1	64.9	54.6	<b>159.8</b>
D) Retained Expenditure % (static)	<i>85.9%</i>	<i>85.9%</i>	<i>85.9%</i>	<i>85.9%</i>	<i>85.9%</i>					
E) Leakage £m	90.7	92.2	97.3	107.9	116.9	1.5	5.1	10.6	8.9	<b>26.2</b>
<b>Claims on Expenditure</b>										
G) Existing Traders Inc Turnover Growth £m <sup>2</sup>	553.6	555.4	559.9	576.9	586.1	1.8	4.5	17.0	9.3	<b>32.5</b>
H) Commitments <sup>3</sup>	0.0	83.3	84.0	86.5	85.3	83.3	0.7	2.5	-1.2	<b>85.3</b>
<b>Impact on capacity £m</b>	<b>553.6</b>	<b>638.7</b>	<b>643.8</b>	<b>663.4</b>	<b>671.5</b>	<b>85.1</b>	<b>5.1</b>	<b>19.5</b>	<b>8.1</b>	<b>117.8</b>
<b>SUMMARY</b>						<b>2009-11</b>	<b>2011-16</b>	<b>2016-21</b>	<b>2021-26</b>	<b>2009-26</b>
Initial surplus £m						9.2	31.1	64.9	54.6	159.8
Claims on capacity £m						85.1	5.1	19.5	8.1	117.8
<b>I) RESIDUAL £m <sup>4</sup></b>						<b>-75.8</b>	<b>26.0</b>	<b>45.4</b>	<b>46.5</b>	<b>42.0</b>
Turnover per sq m (assumed)	10,000					10,032	10,113	10,420	10,587	
<b>J) Floorspace Requirement sq m (net) <sup>5</sup></b>						<b>-7,561</b>	<b>2,569</b>	<b>4,352</b>	<b>4,392</b>	<b>3,753</b>
K) Floorspace Requirement sq m (gross)						-11,632	3,953	6,696	6,757	5,774

#### NOTES:

- (1) Study area expenditure retention - this is the product of the current market share of the study area centres (the cumulative share of the centres within the study area) and the total study area expenditure. The market share remains constant for each of the forecast years.
- (2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by as follows: 2009-2016 at 0.16% per annum, 2016-2021 at 0.6% per annum and 2021-2026 at 0.32% per annum. Sourced from Experian.
- (3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 2 above to account for growth in sales density.
- (4) Residual - the product of the total available expenditure minus the deductions for the existing centres turnover and commitments.
- (5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £10,000/sqm in 2009, which is forecast to increase as per the rates in note 2 until 2026. 65% net to gross ratio assumed.

All monetary values are held constant at 2006 prices.

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 15 - Total Convenience Goods Expenditure & Expenditure Growth: Scenario 2 (lower growth: Draft RSS)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	All Zones Total
Year	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total 2009 (including SFT)	41.74	18.31	54.58	17.99	31.16	36.36	31.57	13.83	35.00	39.89	56.04	38.93	29.16	43.11	38.19	37.84	44.48	36.11	644.32
Deduction for SFT in 2009 (based on survey results)	0.70	0.31	0.91	0.30	0.52	0.61	0.53	0.23	0.59	0.67	0.94	0.65	0.49	0.72	0.64	0.63	0.74	0.60	10.79
<b>Total 2009 (excluding SFT)</b>	<b>41.04</b>	<b>18.01</b>	<b>53.67</b>	<b>17.69</b>	<b>30.64</b>	<b>35.76</b>	<b>31.05</b>	<b>13.60</b>	<b>34.41</b>	<b>39.22</b>	<b>55.10</b>	<b>38.28</b>	<b>28.67</b>	<b>42.39</b>	<b>37.55</b>	<b>37.21</b>	<b>43.74</b>	<b>35.51</b>	<b>633.53</b>
Total 2011 (including SFT)	41.83	18.58	54.59	17.96	31.71	37.08	32.60	14.14	36.13	40.99	56.51	39.67	29.55	44.50	39.09	38.76	44.40	36.96	655.05
Deduction for SFT in 2011 of 2.5%	1.05	0.46	1.36	0.45	0.79	0.93	0.81	0.35	0.90	1.02	1.41	0.99	0.74	1.11	0.98	0.97	1.11	0.92	16.38
<b>Total 2011 (excluding SFT)</b>	<b>40.79</b>	<b>18.11</b>	<b>53.23</b>	<b>17.51</b>	<b>30.92</b>	<b>36.16</b>	<b>31.78</b>	<b>13.79</b>	<b>35.22</b>	<b>39.96</b>	<b>55.10</b>	<b>38.68</b>	<b>28.81</b>	<b>43.39</b>	<b>38.11</b>	<b>37.79</b>	<b>43.29</b>	<b>36.03</b>	<b>638.68</b>
Total 2016 (including SFT)	41.76	18.96	54.54	18.01	38.47	43.80	35.43	17.14	38.92	42.94	57.86	41.28	29.90	47.95	40.68	40.78	43.99	38.85	691.26
Deduction for SFT in 2016 of 3.68%	1.54	0.70	2.01	0.66	1.42	1.61	1.30	0.63	1.43	1.58	2.13	1.52	1.10	1.76	1.50	1.50	1.62	1.43	25.44
<b>Total 2016 (excluding SFT)</b>	<b>40.23</b>	<b>18.27</b>	<b>52.53</b>	<b>17.35</b>	<b>37.06</b>	<b>42.19</b>	<b>34.13</b>	<b>16.50</b>	<b>37.49</b>	<b>41.36</b>	<b>55.73</b>	<b>39.76</b>	<b>28.80</b>	<b>46.19</b>	<b>39.18</b>	<b>39.28</b>	<b>42.37</b>	<b>37.42</b>	<b>665.82</b>
Total 2021 (including SFT)	43.27	19.95	56.32	18.78	41.20	49.31	44.24	19.61	42.87	46.35	59.42	44.29	31.15	52.82	42.65	43.79	47.34	42.05	745.42
Deduction for SFT in 2021 of 3.68%	1.59	0.73	2.07	0.69	1.52	1.81	1.63	0.72	1.58	1.71	2.19	1.63	1.15	1.94	1.57	1.61	1.74	1.55	27.43
<b>Total 2021 (excluding SFT)</b>	<b>41.68</b>	<b>19.21</b>	<b>54.25</b>	<b>18.09</b>	<b>39.68</b>	<b>47.49</b>	<b>42.61</b>	<b>18.89</b>	<b>41.30</b>	<b>44.64</b>	<b>57.24</b>	<b>42.66</b>	<b>30.00</b>	<b>50.87</b>	<b>41.08</b>	<b>42.18</b>	<b>45.60</b>	<b>40.50</b>	<b>717.99</b>
Total 2026 (including SFT)	44.24	20.60	57.39	19.32	42.03	58.89	50.84	20.04	45.99	48.99	60.23	46.58	32.01	56.65	43.91	46.08	51.20	44.69	789.70
Deduction for SFT in 2026 of 3.68%	1.63	0.76	2.11	0.71	1.55	2.17	1.87	0.74	1.69	1.80	2.22	1.71	1.18	2.08	1.62	1.70	1.88	1.64	29.06
<b>Total 2026 (excluding SFT)</b>	<b>42.61</b>	<b>19.84</b>	<b>55.28</b>	<b>18.61</b>	<b>40.49</b>	<b>56.72</b>	<b>48.97</b>	<b>19.30</b>	<b>44.30</b>	<b>47.19</b>	<b>58.01</b>	<b>44.87</b>	<b>30.84</b>	<b>54.57</b>	<b>42.30</b>	<b>44.39</b>	<b>49.32</b>	<b>43.05</b>	<b>760.64</b>
Growth in total expenditure 2008 - 2011	-0.26	0.11	-0.44	-0.18	0.28	0.40	0.73	0.19	0.81	0.74	0.00	0.40	0.13	1.00	0.57	0.58	-0.44	0.53	<b>5.14</b>
Growth in total expenditure 2011 - 2016	-0.56	0.15	-0.70	-0.16	6.14	6.03	2.34	2.72	2.27	1.40	0.63	1.08	-0.01	2.79	1.07	1.49	-0.93	1.38	<b>27.14</b>
Growth in total expenditure 2016 - 2021	1.46	0.95	1.72	0.74	2.63	5.30	8.49	2.39	3.80	3.28	1.51	2.90	1.20	4.69	1.90	2.90	3.24	3.09	<b>52.17</b>
Growth in total expenditure 2021 - 2026	0.93	0.63	1.03	0.52	0.80	9.22	6.36	0.41	3.00	2.55	0.77	2.20	0.83	3.70	1.22	2.20	3.72	2.55	<b>42.65</b>
<b>Growth 2008 - 2026</b>	<b>1.57</b>	<b>1.84</b>	<b>1.61</b>	<b>0.91</b>	<b>9.85</b>	<b>20.96</b>	<b>17.92</b>	<b>5.71</b>	<b>9.88</b>	<b>7.96</b>	<b>2.91</b>	<b>6.59</b>	<b>2.16</b>	<b>12.18</b>	<b>4.75</b>	<b>7.17</b>	<b>5.58</b>	<b>7.54</b>	<b>127.10</b>

#### NOTES:

(1) The figures in the above table are the products of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita convenience goods expenditure), and are in millions of pounds (£m).

(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure in 2009 using the study wide average SFT market share of 1.67%, derived from the telephone survey of households. We have grown the expenditure for SFT to an average of 2.5% in all zones by 2011. For 2016 onwards we use a rate of 3.68% and apply this percentage across all zones.

All monetary values are held constant at 2006 prices.

## SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

### Spreadsheet 16 - Summary of Capacity for Convenience Goods: Scenario 1 (lower growth: Draft RSS) (Static Retention Rate)

	<b>2009</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>Change 2009-11</b>	<b>Change 2011-16</b>	<b>Change 2016-21</b>	<b>Change 2021-26</b>	<b>Change 2009-26</b>
A) Total Population (higher growth scenario)	372,881	377,402	393,750	406,959	421,462	4,521	16,348	13,209	14,503	<b>48,581</b>
B) Total Expenditure £m	644.32	655.05	691.26	745.42	789.70	10.7	36.2	54.2	44.3	<b>145.4</b>
C) Retained Expenditure £m <sup>1</sup>	553.6	562.8	594.0	640.5	678.5	9.2	31.1	46.5	38.0	<b>124.9</b>
D) Retained Expenditure % (static)	<i>85.9%</i>	<i>85.9%</i>	<i>85.9%</i>	<i>85.9%</i>	<i>85.9%</i>					
E) Leakage £m	90.7	92.2	97.3	104.9	111.2	1.5	5.1	7.6	6.2	<b>20.5</b>
<b>Claims on Expenditure</b>										
G) Existing Traders Inc Turnover Growth £m <sup>2</sup>	553.6	555.4	559.9	576.9	586.1	1.8	4.5	17.0	9.3	<b>32.5</b>
H) Commitments <sup>3</sup>	0.0	83.3	84.0	86.5	87.9	83.3	0.7	2.5	1.4	<b>87.9</b>
<b>Impact on capacity £m</b>	<b>553.6</b>	<b>638.7</b>	<b>643.8</b>	<b>663.4</b>	<b>674.1</b>	<b>85.1</b>	<b>5.1</b>	<b>19.5</b>	<b>10.7</b>	<b>120.4</b>
<b>SUMMARY</b>						<b>2009-11</b>	<b>2011-16</b>	<b>2016-21</b>	<b>2021-26</b>	<b>2009-26</b>
Initial surplus £m						9.2	31.1	46.5	38.0	124.9
Claims on capacity £m						85.1	5.1	19.5	10.7	120.4
<b>I) RESIDUAL £m <sup>4</sup></b>						<b>-75.8</b>	<b>26.0</b>	<b>27.0</b>	<b>27.4</b>	<b>4.5</b>
Turnover per sq m (assumed)	10,000					10,032	10,113	10,420	10,587	
<b>J) Floorspace Requirement sq m (net) <sup>5</sup></b>						<b>-7,561</b>	<b>2,569</b>	<b>2,590</b>	<b>2,585</b>	<b>184</b>
K) Floorspace Requirement sq m (gross)						-11,632	3,953	3,985	3,977	283

#### NOTES:

- (1) Study area expenditure retention - this is the product of the current market share of the study area centres (the cumulative share of the centres within the study area) and the total study area expenditure. The market share remains constant for each of the forecast years.
- (2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by as follows: 2009-2016 at 0.16% per annum, 2016-2021 at 0.6% per annum and 2021-2026 at 0.32% per annum. Sourced from Experian.
- (3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 3 above to account for growth in sales density.
- (4) Residual - the product of the total available expenditure minus the deductions for the existing centres turnover and commitments.
- (5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £10,000/sqm in 2009, which is forecast to increase as per the rates in note 3 until 2026. 65% net to gross ratio assumed.

All monetary values are held constant at 2006 prices.



## SECTION 3

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### Leisure Expenditure





# SOUTH GLOUCESTERSHIRE TOWN CENTRES AND RETAIL STUDY

## Spreadsheet 17 - Leisure Sector Expenditure 2009-2026: Scenario 2 (higher growth SOS Proposed Changes RSS)

**Table A - Per Captia expenditure 2009-2026. All figures in £**

Expenditure Category	2009	2011	2016	2021	2026	%
Recreational & cultural services	623.4	633.3	658.7	686.1	714.6	27.8%
Restaurants, Cafes, Etc	1,280.9	1,301.0	1,353.0	1,409.7	1,468.4	57.0%
Hotels	239.7	243.4	253.2	263.8	274.8	10.7%
Hair & personal grooming	101.6	103.2	107.4	111.9	116.5	4.5%
<b>Total Leisure Services Expenditure</b>	<b>2,245.6</b>	<b>2,281.0</b>	<b>2,372.3</b>	<b>2,471.4</b>	<b>2,574.2</b>	<b>100.0%</b>

**Table B Total Expenditure on Different Categories of Leisure Services, 2009-2026. All figures in £m**

COICOP Category	Expenditure Category	2009	2011	2016	2021	2026	Growth 2009-11	Growth 2011-16	Growth 2016-21	Growth 2021-26	Growth 2009-2026	Growth 2009-21	Growth 2009-26
		£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
9.4	Recreational & cultural services	232.5	239.0	259.4	287.1	316.5	6.5	20.4	27.8	29.4	26.9	54.7	84.0
11.1	Restaurants, Cafes, Etc	477.6	491.0	532.8	589.9	650.4	13.4	41.8	57.2	60.5	55.1	112.3	172.8
11.2	Hotels	89.4	91.9	99.7	110.4	121.7	2.5	7.8	10.7	11.3	10.3	21.0	32.3
12.1	Hair & personal grooming	37.9	39.0	42.3	46.8	51.6	1.1	3.3	4.5	4.8	4.4	8.9	13.7
<b>Total</b>	<b>Leisure Expenditure</b>	<b>837.4</b>	<b>860.8</b>	<b>934.1</b>	<b>1,034.2</b>	<b>1,140.2</b>	<b>23.5</b>	<b>73.3</b>	<b>100.1</b>	<b>105.9</b>	<b>96.7</b>	<b>196.9</b>	<b>302.8</b>

**Table C Leisure Expenditure Sub Categories, 2009-2026**

		Total OCA 2009		Total OCA 2011		Total OCA 2016		Total OCA 2021		Total OCA 2026	
Population Projections 09-26		372,881		377,402		393,750		418,480		442,922	
COICOP Category	Description	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)
<b>9.4.1</b>	Recreation and sporting services	140.5	52.38	142.7	53.86	148.4	58.45	154.6	64.70	161.0	71.3
<b>9.4.2</b>	Cultural Services	298.0	111.13	302.7	114.25	314.9	123.99	328.0	137.26	341.6	151.3
<i>09.4.2(pt)</i>	<i>Cinema admissions (sub part of cultural services)</i>	<i>19.3</i>	<i>7.18</i>	<i>19.6</i>	<i>7.38</i>	<i>20.3</i>	<i>8.01</i>	<i>21.2</i>	<i>8.87</i>	<i>22.1</i>	<i>9.8</i>
<i>09.4.2(pt)</i>	<i>Theatre admissions (sub part of cultural services)</i>	<i>34.4</i>	<i>12.83</i>	<i>35.0</i>	<i>13.19</i>	<i>36.4</i>	<i>14.32</i>	<i>37.9</i>	<i>15.85</i>	<i>39.4</i>	<i>17.5</i>
<i>09.4.2(pt)</i>	<i>Television and video rentals (sub part of cultural services)</i>	<i>9.8</i>	<i>3.66</i>	<i>10.0</i>	<i>3.76</i>	<i>10.4</i>	<i>4.08</i>	<i>10.8</i>	<i>4.52</i>	<i>11.3</i>	<i>5.0</i>
<i>09.4.2(pt)</i>	<i>Social subscriptions (sub part of cultural services)</i>	<i>20.0</i>	<i>7.46</i>	<i>20.3</i>	<i>7.67</i>	<i>21.1</i>	<i>8.33</i>	<i>22.0</i>	<i>9.22</i>	<i>22.9</i>	<i>10.2</i>
<i>09.4.2(pt)</i>	<i>Photographic processing (sub part of cultural services)</i>	<i>19.2</i>	<i>7.17</i>	<i>19.5</i>	<i>7.37</i>	<i>20.3</i>	<i>8.00</i>	<i>21.2</i>	<i>8.86</i>	<i>22.0</i>	<i>9.8</i>
<i>09.4.2(pt)</i>	<i>Other (sub part of cultural services)</i>	<i>195.3</i>	<i>72.82</i>	<i>198.4</i>	<i>74.87</i>	<i>206.3</i>	<i>81.25</i>	<i>214.9</i>	<i>89.94</i>	<i>223.8</i>	<i>99.1</i>
<b>09.4.3</b>	Games of chance	184.9	68.96	187.9	70.90	195.4	76.94	203.5	85.18	212.0	93.9
<b>11.1.1</b>	Restaurants, Cafes, Etc	1,146.0	427.32	1,164.0	439.29	1,210.5	476.65	1,261.2	527.79	1,313.8	581.9
<b>11.1.2</b>	Canteens	134.9	50.30	137.0	51.71	142.5	56.11	148.5	62.13	154.6	68.5
<b>11.2</b>	Accommodation Services	239.7	89.36	243.4	91.87	253.2	99.68	263.8	110.38	274.8	121.7
<b>12.1.1</b>	Hairdressing Salons & personal grooming establishments	101.6	37.90	103.2	38.96	107.4	42.29	111.9	46.81	116.5	51.6
<b>Total</b>	<b>Leisure Services</b>	<b>2,245.6</b>	<b>837.35</b>	<b>2,281.0</b>	<b>860.84</b>	<b>2,372.3</b>	<b>934.10</b>	<b>2,471.4</b>	<b>1,034.24</b>	<b>2,574.2</b>	<b>1,140.2</b>

**Notes:**

Per capita leisure expenditure grown at a rate of 0.8% per annum (as per Experian Retail Planner Briefing Note 6.1, Table 3.2 - EBS Forecast, October 2008).

