
Appendix G

Vitality and Viability Methodology



1.1 Introduction

- 1.1.1 This appendix contains the methodology for undertaking the vitality and viability health checks in line with national retail planning policy.

1.2 National Planning Policy Framework (NPPF)

- 1.2.1 The National Planning Policy Framework (NPPF) was published in July 2018. The NPPF sets out the Government's planning policies for England and how these are expected to be applied. It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.
- 1.2.2 The NPPF identifies a number of factors which are of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 85 of the NPPF states that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaption. Paragraph 85 also requires planning policies to promote the long-term viability and vitality of town centres. It notes this should be achieved by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters.

1.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

- 1.3.1 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places for people to want to live, visit and work.
- 1.3.2 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria have been published in the NPPG. Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:





- Diversity of uses – data on the diversity of uses was collated during fieldwork in May 2018.
- Proportion of vacant street level property – vacant properties were also identified during the undertaking of on-site surveys.
- Retailer representation – information on the current strength of the defined centres, retailer representation and retailer requirements has been derived from on-site surveys and various published sources.
- Commercial rents – where available rental data has been sourced from recognised UK property consultants.
- Pedestrian flows – general footfall and pedestrian flows were also observed during WYG's on-site surveys.
- Accessibility – consideration of access to and around the centres is informed by WYG's on-site surveys.
- Perceptions of safety and occurrence of crime – informed by our observations and initiatives present in each centre.
- Views and behaviour – Information on views is based on the NEMS household survey results and feedback from key stakeholders.
- State of town centre environmental quality – consideration of the quality of the buildings and public realm in the centre has also been informed by WYG's 'on the ground' observations.

1.4 South Worcestershire Health Checks

- 1.4.1 For the purposes of this Study, the health check assessments are based on the Experian Goad boundary area of the town centres (surveys undertaken by Experian in September 2018). The use of the Goad boundary is helpful in allowing data on the occupation of units to be 'benchmarked' with national average Goad data. It should however be noted that the Goad Plan boundaries differ slightly to the adopted town centre boundaries and cover slightly larger areas.



Appendix H

Quantitative Retail Needs Assessment



1.1 Introduction

- 1.1.1 This appendix provides an assessment of convenience and comparison goods quantitative needs (retail capacity). As part of the needs assessment the current population and available expenditure (for both convenience and comparison goods) across the Study Area is reviewed and assessed.

1.2 Retail Capacity

- 1.2.1 We have examined the need for new convenience and comparison goods floorspace over the agreed reporting periods to 2041 (i.e. at 2025, 2029, 2035 and 2041, 2041 being the end date of the next local plan period).
- 1.2.2 In considering the capacity figures it should be noted that the NPPF no longer requires for local plans to meet the needs 'in full' in the plan period. Given the uncertainty in forecasting long term retail trends, policies only need to look at least ten years (in this case to 2029) and not necessarily over the full plan period when allocating sites to meet the 'likely' need for town centre uses.
- 1.2.3 A complete series of quantitative retail capacity tables are provided at Appendices Hi, Hii, and Hiii to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

1.3 Population & Retail Expenditure

Population

- 1.3.1 The base population (2019) within each postal code sector has been calculated using Experian Micromarketer MMG3 data. The baseline population data takes into consideration the findings of the 2011 Census release. Population projections figures have also been derived from the Experian Micromarketer MMG3 data which uses the ONS 2016 based sub national population projections.
- 1.3.2 The defined Study Area is estimated to contain a resident population of approximately 537,354 people at 2019 rising to 589,029 people at 2041. This represents an increase in population within the Study Area of 51,675 people (equating to an increase of 9.6%) between 2019 to 2041.



1.3.3 Figure 1.1 provides a detailed breakdown of the forecast population change within each survey zones in each of the reporting period to 2041.

Figure 1.1: Study Area Population by Survey Zone (2019-2038)

Zone	2019	2025	2029	2035	2041
1 - West of Stourport-on-Severn	8,918	9,149	9,247	9,374	9,465
2 - Kidderminster	105,134	107,148	108,241	109,545	110,476
3 - Bromsgrove	51,735	53,714	55,024	56,970	58,360
4 - Tenbury Wells	7,749	7,925	8,094	8,272	8,399
5 - South Worc Rural North West	7,641	7,961	8,191	8,467	8,664
6 - Worcester West	33,310	34,481	35,237	36,090	36,699
7 - Worcester North	60,048	61,835	62,963	64,583	65,740
8 - Worcester East	34,062	34,971	35,674	36,620	37,296
9 - Bromyard	7,353	7,498	7,595	7,696	7,768
10 - South Worc Rural West	9,221	9,555	9,711	9,883	10,006
11 - Great Malvern	40,167	41,640	42,602	44,032	45,053
12 - Ledbury	14,700	14,969	15,197	15,459	15,646
13 - Upton-upon-Severn	10,833	11,303	11,570	11,826	12,009
14 - Tewkesbury	27,365	29,096	30,126	31,498	32,478
15 - Droitwich	36,160	37,511	38,279	39,280	39,995
16 - Pershore	28,851	29,775	30,205	30,743	31,127
17 - Evesham	54,107	56,035	57,255	58,767	59,847
Total	537,354	554,566	565,211	579,105	589,029

Source: Table 1, Appendix Hi

Expenditure

- 1.3.4 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG and other retail/leisure planning consultants in calculating retail capacity.
- 1.3.5 Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 18. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.



Figure 1.2: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2019	0.4	2.6
2020	0.1	2.8
2021	0.3	3.2
2022	0.0	3.2
2023	0.2	3.5
2024	0.1	3.3
2025	0.1	3.2
2026	0.1	3.3
2027	0.1	3.2
2028	0.2	3.1
2029	0.1	3.2
2030	0.1	3.2
2031	0.2	3.3
2032	0.1	3.2
2033	0.2	3.3
2034	0.0	3.1
2035	0.2	3.3
2036	0.1	3.3
2037	0.1	3.2
2038	0.1	3.2
2039	0.1	3.2
2040	0.1	3.2

Source: Appendix 3, Retail Planner Briefing Note 18

- 1.3.6 For convenience goods, Experian forecasts growth to remain subdued with a longer term forecast per head growth of +0.1% per annum. For comparison goods, Experian identify growth to increase from 2.6% per annum to 3.2% per annum in the short term (2019-2025) with growth rates ranging between 3.1-3.3% per annum in the medium and longer term (2025-2041).
- 1.3.7 Experian Retail Planner Briefing Note 18 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. In accordance with retail planning standard practice, we have removed any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.



- 1.3.8 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 1.3.9 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 Retail Planner Briefing Note 16) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Figure 1.3 is removed from identified expenditure as it is not available to stores within the Study Area.

Figure 1.3: Special Forms of Trading Forecasts

Year	Convenience (%)	Comparison (%)
2019	4.0	17.9
2025	5.0	20.7
2029	5.4	21.4
2035	5.8	21.7
2041	6.0	21.9

Source: Appendix 3, Retail Planner Briefing Note 18

Experian forecast only to 2037. Accordingly, 2037 forecast figure adopted for 2041

- 1.3.10 Based on the Retail Planner growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone at 2019, 2025, 2029, 2035 and 2041. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

- 1.3.11 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2019, the resident population of the Study Area will generate some £1,183m of convenience goods expenditure. Available convenience goods expenditure is then forecast to increase to £1,392m at 2041, which represents an increase of £208.3m (or 17.6%) between 2019 and 2041.



Figure 1.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2019 (£m)	2025 (£m)	2029 (£m)	2035 (£m)	2041 (£m)	Growth 2019-2025 (£m)	Growth 2019-2029 (£m)	Growth 2019-2035 (£m)	Growth 2019-2041 (£m)
1,183	1,222	1,246	1,280	1,392	38.5	62.9	96.7	208.3

Source: Table 3, Appendix Hi
2017 Prices

Comparison Goods Expenditure

1.3.12 Figure 1.5 sets out our estimation that the resident population of the Study Area generates some £1,818m of comparison goods expenditure in 2019. Available comparison goods expenditure is then forecast to increase to £3,782m at 2041, which represents an increase of £1,963m between 2019 and 2041. As noted earlier, given the uncertainty in forecasting long term retail trends these longer estimated expenditure growth should be considered with caution.

1.3.13 Whilst the identified expenditure increase is significant, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever-increasing proportion of comparison goods expenditure will be committed through internet shopping.

Figure 1.5: Total Available Study Area Expenditure – Comparison Goods (£m)

2019 (£m)	2025 (£m)	2029 (£m)	2035 (£m)	2041 (£m)	Growth 2019-2025 (£m)	Growth 2019-2029 (£m)	Growth 2019-2035 (£m)	Growth 2019-2041 (£m)
1,819	2,178	2,495	3,181	3,781	359.1	676.8	1,363	1,963

Source: Tables 5a-e, Appendix Hi
2017 Prices

1.3.14 For the purposes of this Study, comparison goods expenditure has been divided into 11 subcategories: 'DIY', 'Large Electrical Household Items', 'Small Electrical Items', and 'Furniture, Carpets & Floor Coverings' (these four categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Furnishings & Household Textiles', 'Health and Beauty/Chemist Goods', 'Small Household Goods', 'Clocks Jewellery & Watches', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.



1.3.15 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

Capacity Formula

1.3.16 For all types of retail capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) less Turnover (£m) (allowing for improved 'productivity') equals Surplus or Deficit (£m).

- **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
 - Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).
- **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Global Data reports – independent analysis which lists the sales densities for all major multiple retailers.
- **Surplus/Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.





1.3.17 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

1.4 Potential Capacity for Future Convenience Goods Floorspace

- 1.4.1 In order to ascertain the likely need for additional convenience floorspace in the retail centres in South Worcestershire, it is first necessary to consider the performance of the current provision. Given the geography of the towns and their existing retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to each retail centre (Worcester, Evesham, Droitwich, Great Malvern, Pershore, Tenbury Wells, and Upton-upon-Severn) will be commensurate with their current market share.
- 1.4.2 Figure 1.6 sets out the current convenience goods trading position in the towns compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2041. The benchmark turnover differs for each operator based on its average turnover per sq m throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey derived turnover equates to the expected level of turnover).
- 1.4.3 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, we have assessed the split in convenience/comparison goods provision in each store having regard to our own observations during store visits and the typical convenience/comparison floorspace ratio published by retail data provider, Global Data. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.



- 1.4.4 Our assessment for the study area identifies that the expected benchmark turnover of existing convenience goods provision in the administrative area is £668.8m per annum at 2019, which is £14.0m less than the identified survey-derived turnover (including inflow) of £682.8m. This suggests that, taken cumulatively, existing convenience goods provision in the study area are 'over trading' when compared to expected turnover.
- 1.4.5 There are instances where specific facilities trade very strongly or relatively poorly. For example, the Tesco stores, St Peters Drive, Worcester, which has an estimated benchmark turnover of £44.9 but turns over an estimated £65.0m is trading particularly well. In contrast, the Asda store, Silver Street, Worcester with an estimated benchmark turnover of £49.7m, but turns over an estimated £24.3m, is a lesser performing store.
- 1.4.6 It is necessary to consider the capacity on an individual town basis. Figure 1.6 below sets out the convenience goods expenditure capacity estimates for Worcester, Evesham, Droitwich, Great Malvern, Pershore, Tenbury Wells, and Upton-upon-Severn.
- 1.4.7 Figure 1.6 shows that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil capacity in Tenbury and Pershore, and limited capacity (less than 700sq m net) in Worcester, Evesham, Droitwich and Upton-upon Severn. Malvern, primarily due to existing stores overtrading, is assessed to have capacity of circa 2,000sq m net by 2029.
- 1.4.8 The assessment also identifies that by the end of the plan period, with the exception of Pershore, and Tenbury Wells, there is a degree of capacity for additional convenience goods floorspace in all towns within South Worcestershire.

Figure 1.6: Quantitative Need for Convenience Goods Floorspace

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Worcester				
2019	-4.6	NA	-4.6	-
2025	1.5	NA	1.5	100
2029	7.7	NA	7.7	700
2035	16.3	NA	16.3	1,500
2041	44.7	NA	44.7	4,000



Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Evesham				
2019	9.1	14.2	-5.1	-
2025	12.3	14.4	-2.1	-
2029	15.4	14.4	1.0	100
2035	19.7	14.4	5.3	500
2041	33.9	14.4	19.6	1,700
Droitwich				
2019	14.3	9.1	5.2	500
2025	15.9	9.2	6.7	600
2029	17.3	9.2	8.1	700
2035	19.3	9.2	10.1	900
2041	25.9	9.2	16.7	1,500
Pershore				
2019	-8.2	NA	-8.2	-
2025	-7.9	NA	-7.9	-
2029	-7.4	NA	-7.4	-
2035	-6.8	NA	-6.8	-
2041	-4.8	NA	-4.8	-
Malvern				
2019	19.4	NA	19.4	1,800
2025	22.0	NA	22.0	2,000
2029	24.3	NA	24.3	2,200
2035	27.6	NA	27.6	2,500
2041	38.4	NA	38.4	3,400
Tenbury				
2019	-18.8	NA	-18.8	-
2025	-18.7	NA	-18.7	-
2029	-18.3	NA	-18.3	-
2035	-17.9	NA	-17.9	-
2041	-16.3	NA	-16.3	-
Upton-upon-Severn				
2019	0.6	NA	0.6	100
2025	0.7	NA	0.7	100
2029	0.7	NA	0.7	100
2035	0.8	NA	0.8	100
2041	1.2	NA	1.2	100

Source: Tables 5-11, Appendix Hii

Notes: Floorspace Requirement - Average sales density assumed to be £11,057/sq m (@ 2019) based on the average sales density of all grocery operators - derived by GlobalData.com.

Allows for increased turnover efficiency. 2017 Prices



1.5 Potential Capacity for Future Comparison Goods Floorspace

- 1.5.1 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area, and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2019.
- 1.5.2 We assume that there is therefore a nil quantitative need for any additional floorspace across the study area at 2019. For the purpose of our initial quantitative modelling exercise, it has also been assumed that the future performance of comparison goods facilities in South Worcestershire will be commensurate with their current market share. Our assessment also takes into consideration the fact that the town centres, retail parks and standalone large format retail units will attract some custom from outside the Study Area. Through discussions with the Council we have assumed that this is 5% (£18.9m @ 2019) of the overall turnover of comparison goods retailers in the city centre of Worcester, 2% of the comparison goods turnovers of Evesham, Droitwich and Pershore town centres (£1.1m, £0.8m and £0.3m @ 2019 respectively), 5% of the turnover of Great Malvern Town Centre (£2.2m @ 2019), and 2% of the turnovers of Tenbury Wells and Upton upon Severn town centre (£0.2m and £0.1m @ 2019 respectively).
- 1.5.3 In order to ascertain the likely need for additional comparison goods floorspace within each town, we consider them independently and identify their market share below. We have taken into account relevant comparison goods retail commitments/planning permissions within South Worcestershire in the retail capacity assessment. Details of the commitments/planning permissions have been provided by the Councils and are provided in the capacity tables at **Appendix Hiii**.
- 1.5.4 A minimum and maximum floorspace requirement is identified to reflect the variations in retailer sales densities. The minimum floorspace requirement figure is based on the identified need being met through the delivery of high street floorspace in the town centres and the maximum figure relates to need being met by bulky goods retailers, which generally accommodate operators which achieve lesser sales densities. It is considered that the minimum floorspace requirement figure should be adopted when planning for additional floorspace in the town centres.



- 1.5.5 The comparison goods residual expenditure/floorspace capacity figures for the 7 city/town centres after taking into account commitments/planning permissions are summarised in Figure 1.7 below.
- 1.5.6 The assessment identifies that as the main comparison goods retail destination in South Worcestershire, Worcester is assessed to have the greatest level of floorspace capacity requirements by 2029 (6,200sq m net).
- 1.5.7 For Evesham, the existing commitments/planning permissions are assessed to absorb any available floorspace capacity requirements at 2029, whilst in Malvern, it is estimated that there is likely to be comparison goods floorspace capacity of circa 1,000sq m net by 2029.
- 1.5.8 Turning to Pershore and Droitwich, capacity in Pershore is assessed to be limited to circa 300sq m net whilst Droitwich's capacity is assessed to be at slightly higher level: 800sq m net by 2029.
- 1.5.9 In terms of the smaller centres of Tenbury Wells and Upton-upon-Severn, only a very small (100sq m net) level of capacity is identified in Tenbury Wells by 2029 whilst no capacity is identified for Upton-upon-Severn by 2029.

Figure 1.7: Quantitative Need for Comparison Goods Floorspace

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement (sq m net)	
	£m	£m	£m	Minimum	Maximum
Worcester					
2025	12.0	-	12.0	1,700	2,500
2029	48.3	-	48.3	6,200	9,400
2035	157.6	-	157.6	17,800	26,700
2041	223.7	-	223.7	22,000	33,000
Evesham					
2025	2.7	10.6	-	-	-
2029	11.0	11.6	-	-	-
2035	35.8	13.3	22.5	2,900	4,700
2041	50.9	15.2	35.6	4,000	6,500
Droitwich					
2025	1.4	NA	1.4	200	400
2029	5.5	NA	5.5	800	1,300
2035	17.9	NA	17.9	2,300	3,700
2041	25.5	NA	25.5	2,900	4,600



Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement (sq m net)	
	£m	£m	£m	Minimum	Maximum
Pershore					
2025	0.5	NA	0.5	100	100
2029	1.9	NA	1.9	300	500
2035	6.3	NA	6.3	800	1,400
2041	8.9	NA	8.9	1,100	1,800
Malvern					
2025	3.0	4.8	-	-	-
2029	12.2	5.3	7.0	1,000	1,700
2035	40.0	6.1	33.9	4,400	7,100
2041	56.8	7.0	49.8	5,600	9,100
Tenbury Wells					
2025	0.2	NA	0.2	-	100
2029	0.7	NA	0.7	100	200
2035	2.3	NA	2.3	300	600
2041	3.3	NA	3.3	400	700
Upton-upon-Severn					
2025	0.1	NA	0.1	-	-
2029	0.3	NA	0.3	-	100
2035	0.9	NA	0.9	100	200
2041	1.3	NA	1.3	200	300

Source: Appendix Hiii
2017 Prices

- 1.5.10 The assessment also identifies that by the end of the plan period, there is a degree of capacity for additional comparison goods floorspace in all towns within South Worcestershire, The greatest level of capacity identified for Worcester (22,000sq m net) with between circa 3,000-5,500 identified for Malvern, Evesham and Droitwich and smaller amount for Pershore (circa 1,000sq m net), Tenbury (400sq m net) and Upton-upon-Severn (200sq m).



1.6 Summary

- 1.6.1 The above assessment identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil convenience goods capacity in Tenbury and Pershore, and limited capacity (less than 700sq m net) in Worcester, Evesham, Droitwich and Upton-upon Severn. Malvern, primarily due to existing stores overtrading, is assessed to have capacity of circa 2,000sq m net by 2029.
- 1.6.2 In terms of comparison goods capacity by 2029, as the largest centre in South Worcestershire, the majority of comparison goods floorspace capacity is identified in Worcester (circa 6,000sq m net). Across the other towns in South Worcestershire, the estimated capacity varies. Malvern and Droitwich both have an estimated floorspace capacity of circa 1,000sqm net, whilst Pershore and Tenbury Wells have a smaller level capacity (300sq m and 100sqm net respectively). Retail commitments/planning permission absorb any available comparison goods capacity in Evesham and, primarily due to its size and role, there is no capacity for comparison goods floorspace in Upton-upon-Severn by 2029.





Appendix Hi: Population and Retail Expenditure





SOUTH WORCESTERSHIRE RETAIL & CENTRES STUDY, 2019

Table 1: Population Growth, by Zone

Zone	2019	2025	2029	2035	2041	Change 2019-2025		Change 2019-2029		Change 2019-2035		Change 2019-2041	
						No.	%	No.	%	No.	%	No.	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]
1 - West of Stourport-on-Severn	8,918	9,149	9,247	9,374	9,465	231	2.6	329	3.7	456	5.1	547	6.1
2 - Kidderminster	105,134	107,148	108,241	109,545	110,476	2,014	1.9	3,107	3.0	4,411	4.2	5,342	5.1
3 - Bromsgrove	51,735	53,714	55,024	56,970	58,360	1,979	3.8	3,289	6.4	5,235	10.1	6,625	12.8
4 - Tenbury Wells	7,749	7,925	8,094	8,272	8,399	176	2.3	345	4.5	523	6.7	650	8.4
5 - South Worc Rural North West	7,641	7,961	8,191	8,467	8,664	320	4.2	550	7.2	826	10.8	1,023	13.4
6 - Worcester West	33,310	34,481	35,237	36,090	36,699	1,171	3.5	1,927	5.8	2,780	8.3	3,389	10.2
7 - Worcester North	60,048	61,835	62,963	64,583	65,740	1,787	3.0	2,915	4.9	4,535	7.6	5,692	9.5
8 - Worcester East	34,062	34,971	35,674	36,620	37,296	909	2.7	1,612	4.7	2,558	7.5	3,234	9.5
9 - Bromyard	7,353	7,498	7,595	7,696	7,768	145	2.0	242	3.3	343	4.7	415	5.6
10 - Sout Worc Rural West	9,221	9,555	9,711	9,883	10,006	334	3.6	490	5.3	662	7.2	785	8.5
11 - Great Malvern	40,167	41,640	42,602	44,032	45,053	1,473	3.7	2,435	6.1	3,865	9.6	4,886	12.2
12 - Ledbury	14,700	14,969	15,197	15,459	15,646	269	1.8	497	3.4	759	5.2	946	6.4
13 - Upton-upon-Severn	10,833	11,303	11,570	11,826	12,009	470	4.3	737	6.8	993	9.2	1,176	10.9
14 - Tewkesbury	27,365	29,096	30,126	31,498	32,478	1,731	6.3	2,761	10.1	4,133	15.1	5,113	18.7
15 - Droitwich	36,160	37,511	38,279	39,280	39,995	1,351	3.7	2,119	5.9	3,120	8.6	3,835	10.6
16 - Pershore	28,851	29,775	30,205	30,743	31,127	924	3.2	1,354	4.7	1,892	6.6	2,276	7.9
17 - Evesham	54,107	56,035	57,255	58,767	59,847	1,928	3.6	3,148	5.8	4,660	8.6	5,740	10.6
Total	537,354	554,566	565,211	579,105	589,029	17,212	3.2	27,857	5.2	41,751	7.8	51,675	9.6

Notes:

[1], [2], [3], [4], [5] Population figures taken from Experian Retail Planner Area Profile Report for each zone (2011 Census)

[6] = [2] - [1]

[7] = [6] / [1]

[8] = [3] - [1]

[9] = [8] / [1]

[10] = [4] - [1]

[11] = [10] / [1]

[12] = [5] - [1]

[13] = [12] / [1]

Table 2a - Per Capita Comparison Goods Expenditure, by Category, 2017 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1 - West of Stourport-on-Severn	936	207	181	222	161	601	442	144	258	212	322	3,684
2 - Kidderminster	850	162	147	179	128	443	387	103	233	154	267	3,054
3 - Bromsgrove	890	169	151	184	143	470	405	101	251	157	281	3,201
4 - Tenbury Wells	811	170	161	180	135	515	379	118	200	182	265	3,117
5 - South Worc Rural North West	974	239	187	248	158	681	485	158	300	235	370	4,035
6 - Worcester West	951	182	150	186	149	446	402	103	276	153	285	3,284
7 - Worcester North	820	147	128	161	127	417	365	90	228	125	240	2,850
8 - Worcester East	887	162	143	181	145	450	398	96	247	144	273	3,126
9 - Bromyard	772	158	154	169	121	497	363	111	186	174	248	2,952
10 - Sout Worc Rural West	1,026	241	200	261	183	659	504	164	306	239	382	4,165
11 - Great Malvern	862	167	147	185	132	432	407	109	234	157	276	3,108
12 - Ledbury	888	184	163	205	142	527	416	127	237	191	288	3,367
13 - Upton-upon-Severn	929	235	173	264	178	607	502	185	311	238	341	3,963
14 - Tewkesbury	769	168	123	204	154	465	407	145	275	164	234	3,108
15 - Droitwich	902	186	155	200	140	503	423	114	258	171	307	3,359
16 - Pershore	962	216	179	239	170	573	467	143	282	206	348	3,784
17 - Evesham	869	172	145	192	139	488	398	116	238	159	279	3,196

Table 2b - Per Capita Comparison Goods Expenditure, by Category, 2019 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1 - West of Stourport-on-Severn	986	217	190	234	169	632	465	152	271	223	339	3,878
2 - Kidderminster	895	170	154	189	135	467	408	109	245	162	281	3,215
3 - Bromsgrove	937	178	159	194	151	495	426	106	264	165	296	3,370
4 - Tenbury Wells	854	179	170	190	143	542	399	125	210	191	279	3,281
5 - South Worc Rural North West	1,025	252	196	261	166	717	510	167	316	247	389	4,248
6 - Worcester West	1,002	192	158	196	157	469	423	108	291	161	300	3,457
7 - Worcester North	864	154	135	170	134	440	384	95	240	132	253	3,000
8 - Worcester East	934	171	150	191	152	473	419	101	260	152	287	3,291
9 - Bromyard	813	166	162	177	127	524	382	117	196	183	261	3,108
10 - South Worc Rural West	1,080	254	211	274	192	694	531	173	322	251	402	4,384
11 - Great Malvern	907	176	155	194	139	455	429	115	246	165	290	3,272
12 - Ledbury	935	193	171	216	150	555	438	133	249	202	303	3,545
13 - Upton-upon-Severn	978	247	182	278	187	639	529	195	328	251	359	4,172
14 - Tewkesbury	810	177	129	215	163	490	428	153	290	172	246	3,272
15 - Droitwich	949	196	163	210	147	530	445	120	271	180	323	3,536
16 - Pershore	1,013	228	189	251	179	603	491	151	297	217	366	3,984
17 - Evesham	915	181	152	202	146	514	419	122	250	167	294	3,365

Notes

2017 base expenditure taken from Experian MMG3 data (February 2019)

Comparison goods expenditure growth projected forward from 2017 base using the growth rates in Appendix 3 of Experian Retail Planner Briefing Note 16.

Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 16.

2017 prices

Table 2c: Per Capita Comparison Goods Expenditure, by Category, 2025 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1 - West of Stourport-on-Severn	1,143	252	221	271	196	734	539	176	315	259	393	4,499
2 - Kidderminster	1,038	197	179	219	156	541	473	126	284	188	326	3,729
3 - Bromsgrove	1,087	206	184	225	175	574	494	123	307	191	343	3,909
4 - Tenbury Wells	990	207	197	220	165	629	463	144	244	222	324	3,806
5 - South Worc Rural North West	1,189	292	228	303	193	831	592	193	367	287	452	4,927
6 - Worcester West	1,162	222	184	227	182	545	491	125	337	187	348	4,010
7 - Worcester North	1,002	179	157	197	156	510	445	110	279	153	293	3,480
8 - Worcester East	1,083	198	174	221	177	549	486	117	302	176	333	3,818
9 - Bromyard	943	193	188	206	148	607	443	136	227	213	303	3,605
10 - South Worc Rural West	1,253	295	244	318	223	805	616	201	374	292	466	5,086
11 - Great Malvern	1,053	204	180	226	162	528	497	133	286	192	337	3,796
12 - Ledbury	1,085	224	199	250	174	644	508	154	289	234	352	4,112
13 - Upton-upon-Severn	1,135	286	212	323	217	741	613	226	380	291	416	4,840
14 - Tewkesbury	939	205	150	249	189	568	497	177	336	200	286	3,796
15 - Droitwich	1,101	228	189	244	171	615	516	139	315	209	375	4,102
16 - Pershore	1,175	264	219	291	207	699	570	175	345	252	425	4,622
17 - Evesham	1,062	210	177	234	170	596	486	142	290	194	341	3,903

Table 2d: Per Capita Comparison Goods Expenditure, by Category, 2029 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1 - West of Stourport-on-Severn	1,285	284	248	305	221	825	606	198	354	291	442	5,058
2 - Kidderminster	1,167	222	201	246	175	609	532	142	320	212	366	4,193
3 - Bromsgrove	1,222	232	207	253	197	645	555	138	345	215	386	4,395
4 - Tenbury Wells	1,113	233	221	248	186	707	520	162	274	250	364	4,279
5 - South Worc Rural North West	1,337	328	256	341	217	935	666	217	413	322	508	5,540
6 - Worcester West	1,306	250	206	256	205	612	552	141	379	210	391	4,509
7 - Worcester North	1,126	201	176	221	175	573	501	123	313	172	330	3,913
8 - Worcester East	1,218	223	196	249	199	617	547	132	340	198	375	4,292
9 - Bromyard	1,060	217	211	231	166	683	498	153	255	239	340	4,053
10 - Sout Worc Rural West	1,409	331	275	358	251	905	692	226	420	328	524	5,718
11 - Great Malvern	1,183	229	202	254	182	594	559	150	321	215	378	4,268
12 - Ledbury	1,219	252	223	281	195	724	571	174	325	263	395	4,623
13 - Upton-upon-Severn	1,276	322	238	363	244	833	690	254	427	327	468	5,442
14 - Tewkesbury	1,056	230	168	280	212	639	559	199	378	225	321	4,268
15 - Droitwich	1,238	256	213	274	192	691	581	157	354	235	422	4,612
16 - Pershore	1,321	297	246	327	233	786	641	197	388	283	477	5,196
17 - Evesham	1,194	236	199	263	191	670	547	159	326	218	384	4,388

Notes

2017 base expenditure taken from Experian MMG3 data (February 2019)

Comparison goods expenditure growth projected forward from 2017 base using the growth rates in Appendix 3 of Experian Retail Planner Briefing Note 16.

Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 16.

2017 prices

Table 2e: Per Capita Comparison Goods Expenditure, by Category, 2035 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1 - West of Stourport-on-Severn	1,599	353	309	379	275	1,026	754	246	440	362	550	6,294
2 - Kidderminster	1,452	276	251	306	218	757	662	177	398	263	456	5,217
3 - Bromsgrove	1,520	288	257	315	245	803	691	172	429	268	480	5,468
4 - Tenbury Wells	1,385	290	275	308	231	880	647	202	341	311	453	5,325
5 - South Worc Rural North West	1,663	409	319	424	270	1,163	828	271	513	401	632	6,893
6 - Worcester West	1,625	311	257	318	255	762	686	176	472	262	487	5,610
7 - Worcester North	1,401	251	219	275	218	713	623	154	390	214	411	4,869
8 - Worcester East	1,515	277	244	310	247	768	680	164	423	246	466	5,341
9 - Bromyard	1,319	269	263	288	206	850	620	190	318	297	423	5,043
10 - South Worc Rural West	1,753	412	342	445	312	1,126	861	281	523	408	652	7,115
11 - Great Malvern	1,473	285	252	316	226	739	696	186	400	268	471	5,310
12 - Ledbury	1,517	314	278	350	243	901	710	216	405	327	492	5,752
13 - Upton-upon-Severn	1,587	401	296	452	304	1,037	858	316	532	407	582	6,771
14 - Tewkesbury	1,314	287	210	349	264	795	695	248	471	279	399	5,310
15 - Droitwich	1,541	319	265	341	239	860	723	195	440	293	525	5,739
16 - Pershore	1,643	369	306	407	290	978	797	245	483	352	594	6,466
17 - Evesham	1,485	294	247	328	238	834	680	198	406	272	477	5,460

Table 2f: Per Capita Comparison Goods Expenditure, by Category, 2041 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1 - West of Stourport-on-Severn	1,869	412	361	443	321	1,199	882	288	514	423	643	7,356
2 - Kidderminster	1,697	323	293	358	255	885	774	207	465	308	533	6,097
3 - Bromsgrove	1,777	337	301	368	286	938	808	201	502	313	561	6,391
4 - Tenbury Wells	1,619	339	322	360	270	1,028	756	236	399	363	530	6,223
5 - South Worc Rural North West	1,944	478	373	496	315	1,359	968	316	600	469	739	8,056
6 - Worcester West	1,900	363	300	372	298	890	802	205	552	306	569	6,557
7 - Worcester North	1,638	293	256	322	254	834	728	180	456	251	480	5,690
8 - Worcester East	1,771	324	285	362	289	898	795	192	494	287	545	6,242
9 - Bromyard	1,541	315	307	336	241	993	724	222	371	348	495	5,894
10 - South Worc Rural West	2,049	482	399	520	365	1,316	1,007	328	611	477	762	8,315
11 - Great Malvern	1,721	333	294	369	264	863	813	218	467	313	550	6,206
12 - Ledbury	1,773	367	325	409	284	1,052	830	253	473	382	575	6,723
13 - Upton-upon-Severn	1,855	468	346	528	355	1,212	1,003	369	621	476	680	7,913
14 - Tewkesbury	1,536	335	245	408	308	929	813	289	550	327	467	6,206
15 - Droitwich	1,801	372	309	399	279	1,005	844	228	515	342	613	6,707
16 - Pershore	1,921	432	358	476	339	1,143	932	286	564	411	694	7,556
17 - Evesham	1,736	344	289	383	278	975	795	232	475	318	558	6,382

Notes

2017 base expenditure taken from Experian MMG3 data (February 2019)

Comparison goods expenditure growth projected forward from 2017 base using the growth rates in Appendix 3 of Experian Retail Planner Briefing Note 16.

Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 16.

2017 prices

SOUTH WORCESTERSHIRE RETAIL & CENTRES STUDY, 2019

Table 3a: Total Comparison Goods Expenditure, by Category, 2019 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - West of Stourport-on-Severn	8.8	1.9	1.7	2.1	1.5	5.6	4.1	1.4	2.4	2.0	3.0
2 - Kidderminster	94.1	17.9	16.2	19.9	14.1	49.1	42.9	11.5	25.8	17.1	29.5
3 - Bromsgrove	48.5	9.2	8.2	10.0	7.8	25.6	22.0	5.5	13.7	8.5	15.3
4 - Tenbury Wells	6.6	1.4	1.3	1.5	1.1	4.2	3.1	1.0	1.6	1.5	2.2
5 - South Worc Rural North West	7.8	1.9	1.5	2.0	1.3	5.5	3.9	1.3	2.4	1.9	3.0
6 - Worcester West	33.4	6.4	5.3	6.5	5.2	15.6	14.1	3.6	9.7	5.4	10.0
7 - Worcester North	51.9	9.3	8.1	10.2	8.1	26.4	23.0	5.7	14.4	7.9	15.2
8 - Worcester East	31.8	5.8	5.1	6.5	5.2	16.1	14.3	3.4	8.9	5.2	9.8
9 - Bromyard	6.0	1.2	1.2	1.3	0.9	3.8	2.8	0.9	1.4	1.3	1.9
10 - Sout Worc Rural West	10.0	2.3	1.9	2.5	1.8	6.4	4.9	1.6	3.0	2.3	3.7
11 - Great Malvern	36.4	7.1	6.2	7.8	5.6	18.3	17.2	4.6	9.9	6.6	11.7
12 - Ledbury	13.7	2.8	2.5	3.2	2.2	8.2	6.4	2.0	3.7	3.0	4.5
13 - Upton-upon-Severn	10.6	2.7	2.0	3.0	2.0	6.9	5.7	2.1	3.5	2.7	3.9
14 - Tewkesbury	22.2	4.8	3.5	5.9	4.4	13.4	11.7	4.2	7.9	4.7	6.7
15 - Droitwich	34.3	7.1	5.9	7.6	5.3	19.2	16.1	4.3	9.8	6.5	11.7
16 - Pershore	29.2	6.6	5.4	7.2	5.2	17.4	14.2	4.4	8.6	6.3	10.6
17 - Evesham	49.5	9.8	8.2	10.9	7.9	27.8	22.7	6.6	13.5	9.1	15.9
Total	494.8	98.3	84.4	108.1	79.7	269.5	229.2	63.9	140.3	92.0	158.5

Table 3b: Total Comparison Goods Expenditure, by Category, 2025 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - West of Stourport-on-Severn	10.5	2.3	2.0	2.5	1.8	6.7	4.9	1.6	2.9	2.4	3.6
2 - Kidderminster	111.2	21.2	19.2	23.5	16.7	58.0	50.7	13.5	30.5	20.2	34.9
3 - Bromsgrove	58.4	11.1	9.9	12.1	9.4	30.8	26.5	6.6	16.5	10.3	18.4
4 - Tenbury Wells	7.8	1.6	1.6	1.7	1.3	5.0	3.7	1.1	1.9	1.8	2.6
5 - South Worc Rural North West	9.5	2.3	1.8	2.4	1.5	6.6	4.7	1.5	2.9	2.3	3.6
6 - Worcester West	40.1	7.7	6.3	7.8	6.3	18.8	16.9	4.3	11.6	6.4	12.0
7 - Worcester North	61.9	11.1	9.7	12.2	9.6	31.5	27.5	6.8	17.2	9.5	18.1
8 - Worcester East	37.9	6.9	6.1	7.7	6.2	19.2	17.0	4.1	10.6	6.1	11.7
9 - Bromyard	7.1	1.4	1.4	1.5	1.1	4.6	3.3	1.0	1.7	1.6	2.3
10 - Sout Worc Rural West	12.0	2.8	2.3	3.0	2.1	7.7	5.9	1.9	3.6	2.8	4.5
11 - Great Malvern	43.8	8.5	7.5	9.4	6.7	22.0	20.7	5.5	11.9	8.0	14.0
12 - Ledbury	16.2	3.4	3.0	3.7	2.6	9.6	7.6	2.3	4.3	3.5	5.3
13 - Upton-upon-Severn	12.8	3.2	2.4	3.6	2.5	8.4	6.9	2.6	4.3	3.3	4.7
14 - Tewkesbury	27.3	6.0	4.4	7.3	5.5	16.5	14.5	5.1	9.8	5.8	8.3
15 - Droitwich	41.3	8.5	7.1	9.1	6.4	23.1	19.4	5.2	11.8	7.9	14.1
16 - Pershore	35.0	7.9	6.5	8.7	6.2	20.8	17.0	5.2	10.3	7.5	12.6
17 - Evesham	59.5	11.8	9.9	13.1	9.5	33.4	27.3	7.9	16.3	10.9	19.1
Total	592.3	117.7	101.1	129.5	95.5	322.7	274.5	76.5	168.1	110.1	189.8

Table 3c: Total Comparison Goods Expenditure, by Category, 2029 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - West of Stourport-on-Severn	11.9	2.6	2.3	2.8	2.0	7.6	5.6	1.8	3.3	2.7	4.1
2 - Kidderminster	126.3	24.0	21.8	26.7	19.0	65.9	57.6	15.4	34.6	22.9	39.7
3 - Bromsgrove	67.2	12.7	11.4	13.9	10.8	35.5	30.6	7.6	19.0	11.8	21.2
4 - Tenbury Wells	9.0	1.9	1.8	2.0	1.5	5.7	4.2	1.3	2.2	2.0	2.9
5 - South Worc Rural North West	10.9	2.7	2.1	2.8	1.8	7.7	5.5	1.8	3.4	2.6	4.2
6 - Worcester West	46.0	8.8	7.3	9.0	7.2	21.6	19.4	5.0	13.4	7.4	13.8
7 - Worcester North	70.9	12.7	11.1	13.9	11.0	36.1	31.5	7.8	19.7	10.8	20.8
8 - Worcester East	43.4	8.0	7.0	8.9	7.1	22.0	19.5	4.7	12.1	7.0	13.4
9 - Bromyard	8.0	1.6	1.6	1.8	1.3	5.2	3.8	1.2	1.9	1.8	2.6
10 - Sout Worc Rural West	13.7	3.2	2.7	3.5	2.4	8.8	6.7	2.2	4.1	3.2	5.1
11 - Great Malvern	50.4	9.8	8.6	10.8	7.7	25.3	23.8	6.4	13.7	9.2	16.1
12 - Ledbury	18.5	3.8	3.4	4.3	3.0	11.0	8.7	2.6	4.9	4.0	6.0
13 - Upton-upon-Severn	14.8	3.7	2.8	4.2	2.8	9.6	8.0	2.9	4.9	3.8	5.4
14 - Tewkesbury	31.8	6.9	5.1	8.4	6.4	19.2	16.8	6.0	11.4	6.8	9.7
15 - Droitwich	47.4	9.8	8.1	10.5	7.3	26.4	22.2	6.0	13.6	9.0	16.1
16 - Pershore	39.9	9.0	7.4	9.9	7.0	23.7	19.4	5.9	11.7	8.5	14.4
17 - Evesham	68.3	13.5	11.4	15.1	10.9	38.4	31.3	9.1	18.7	12.5	22.0
Total	678.7	134.8	115.8	148.4	109.4	369.8	314.6	87.7	192.6	126.2	217.4

Table 3d: Total Comparison Goods Expenditure, by Category, 2035 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - West of Stourport-on-Severn	15.0	3.3	2.9	3.6	2.6	9.6	7.1	2.3	4.1	3.4	5.2
2 - Kidderminster	159.1	30.3	27.5	33.6	23.9	83.0	72.5	19.4	43.6	28.9	49.9
3 - Bromsgrove	86.6	16.4	14.7	17.9	14.0	45.7	39.4	9.8	24.5	15.2	27.3
4 - Tenbury Wells	11.5	2.4	2.3	2.5	1.9	7.3	5.4	1.7	2.8	2.6	3.7
5 - South Worc Rural North West	14.1	3.5	2.7	3.6	2.3	9.8	7.0	2.3	4.3	3.4	5.4
6 - Worcester West	58.7	11.2	9.3	11.5	9.2	27.5	24.8	6.3	17.0	9.4	17.6
7 - Worcester North	90.5	16.2	14.2	17.8	14.1	46.1	40.2	9.9	25.2	13.8	26.5
8 - Worcester East	55.5	10.2	8.9	11.3	9.1	28.1	24.9	6.0	15.5	9.0	17.1
9 - Bromyard	10.1	2.1	2.0	2.2	1.6	6.5	4.8	1.5	2.4	2.3	3.3
10 - Sout Worc Rural West	17.3	4.1	3.4	4.4	3.1	11.1	8.5	2.8	5.2	4.0	6.4
11 - Great Malvern	64.8	12.6	11.1	13.9	10.0	32.5	30.6	8.2	17.6	11.8	20.7
12 - Ledbury	23.5	4.9	4.3	5.4	3.8	13.9	11.0	3.3	6.3	5.1	7.6
13 - Upton-upon-Severn	18.8	4.7	3.5	5.3	3.6	12.3	10.1	3.7	6.3	4.8	6.9
14 - Tewkesbury	41.4	9.0	6.6	11.0	8.3	25.0	21.9	7.8	14.8	8.8	12.6
15 - Droitwich	60.5	12.5	10.4	13.4	9.4	33.8	28.4	7.7	17.3	11.5	20.6
16 - Pershore	50.5	11.4	9.4	12.5	8.9	30.1	24.5	7.5	14.8	10.8	18.3
17 - Evesham	87.3	17.3	14.5	19.2	14.0	49.0	40.0	11.7	23.9	16.0	28.1
Total	865.1	171.9	147.6	189.2	139.5	471.4	401.1	111.9	245.6	160.8	277.1

Table 3e: Total Comparison Goods Expenditure, by Category, 2041 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - West of Stourport-on-Severn	17.7	3.9	3.4	4.2	3.0	11.4	8.3	2.7	4.9	4.0	6.1
2 - Kidderminster	187.5	35.7	32.4	39.6	28.2	97.8	85.5	22.8	51.4	34.0	58.9
3 - Bromsgrove	103.7	19.7	17.5	21.5	16.7	54.7	47.1	11.8	29.3	18.3	32.7
4 - Tenbury Wells	13.6	2.8	2.7	3.0	2.3	8.6	6.4	2.0	3.3	3.0	4.5
5 - South Worc Rural North West	16.8	4.1	3.2	4.3	2.7	11.8	8.4	2.7	5.2	4.1	6.4
6 - Worcester West	69.7	13.3	11.0	13.6	10.9	32.7	29.4	7.5	20.2	11.2	20.9
7 - Worcester North	107.7	19.3	16.8	21.1	16.7	54.8	47.9	11.8	30.0	16.5	31.5
8 - Worcester East	66.0	12.1	10.6	13.5	10.8	33.5	29.7	7.2	18.4	10.7	20.3
9 - Bromyard	12.0	2.4	2.4	2.6	1.9	7.7	5.6	1.7	2.9	2.7	3.8
10 - Sout Worc Rural West	20.5	4.8	4.0	5.2	3.7	13.2	10.1	3.3	6.1	4.8	7.6
11 - Great Malvern	77.5	15.0	13.2	16.6	11.9	38.9	36.6	9.8	21.1	14.1	24.8
12 - Ledbury	27.7	5.7	5.1	6.4	4.4	16.5	13.0	4.0	7.4	6.0	9.0
13 - Upton-upon-Severn	22.3	5.6	4.2	6.3	4.3	14.6	12.0	4.4	7.5	5.7	8.2
14 - Tewkesbury	49.9	10.9	8.0	13.2	10.0	30.2	26.4	9.4	17.9	10.6	15.2
15 - Droitwich	72.0	14.9	12.4	15.9	11.2	40.2	33.8	9.1	20.6	13.7	24.5
16 - Pershore	59.8	13.4	11.1	14.8	10.6	35.6	29.0	8.9	17.6	12.8	21.6
17 - Evesham	103.9	20.6	17.3	22.9	16.6	58.3	47.6	13.9	28.4	19.0	33.4
Total	1,028	204.3	175.4	224.9	165.8	560.3	476.8	133.0	292.0	191.2	329.4

Notes:

Total Expenditure = Population for each zone (Table 1) multiplied by per capita expenditure for each zone (Table 2b-2f)

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & CENTRES STUDY, 2019

Table 4: Per Capita Convenience Goods Expenditure, by Zone (£)

Zone	2019	2025	2029	2035	2041
1 - West of Stourport-on-Severn	2,597	2,599	2,601	2,608	2,788
2 - Kidderminster	2,175	2,176	2,178	2,184	2,335
3 - Bromsgrove	2,063	2,064	2,066	2,071	2,214
4 - Tenbury Wells	2,417	2,418	2,420	2,427	2,594
5 - South Worc Rural North West	2,643	2,644	2,646	2,654	2,837
6 - Worcester West	2,177	2,178	2,180	2,186	2,337
7 - Worcester North	1,968	1,969	1,970	1,976	2,112
8 - Worcester East	2,082	2,083	2,085	2,091	2,235
9 - Bromyard	2,382	2,383	2,385	2,392	2,557
10 - Sout Worc Rural West	2,774	2,775	2,777	2,785	2,977
11 - Great Malvern	2,135	2,136	2,137	2,143	2,291
12 - Ledbury	2,327	2,328	2,330	2,336	2,497
13 - Upton-upon-Severn	2,708	2,709	2,711	2,719	2,907
14 - Tewkesbury	2,125	2,126	2,128	2,133	2,281
15 - Droitwich	2,231	2,232	2,234	2,240	2,395
16 - Pershore	2,525	2,527	2,529	2,536	2,711
17 - Evesham	2,224	2,225	2,227	2,233	2,387

Notes

Per capita expenditure derived from Experian MMG3 data (February 2019)

Per capita expenditure projected forward using forecast growth rates taken from Experian Retail Planner Briefing Note 16

Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 16

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & CENTRES STUDY, 2019

Table 5: Total Available Convenience Expenditure, by Zone (£m)

Zone	2019	2025	2029	2035	2041	Change 2019-25		Change 2019-29		Change 2019-35		Change 2019-41	
	[1]	[2]	[3]	[4]	[5]	No.	%	No.	%	No.	%	No.	%
	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]					
1 - West of Stourport-on-Severn	23.2	23.8	24.0	24.4	26.4	0.6	2.6	0.9	3.8	1.3	5.5	3.2	13.9
2 - Kidderminster	228.7	233.2	235.7	239.2	257.9	4.5	2.0	7.1	3.1	10.6	4.6	29.2	12.8
3 - Bromsgrove	106.7	110.9	113.7	118.0	129.2	4.1	3.9	6.9	6.5	11.3	10.6	22.5	21.1
4 - Tenbury Wells	18.7	19.2	19.6	20.1	21.8	0.4	2.3	0.9	4.6	1.3	7.2	3.1	16.3
5 - South Worc Rural North West	20.2	21.1	21.7	22.5	24.6	0.9	4.2	1.5	7.3	2.3	11.3	4.4	21.7
6 - Worcester West	72.5	75.1	76.8	78.9	85.8	2.6	3.6	4.3	5.9	6.4	8.8	13.2	18.3
7 - Worcester North	118.2	121.7	124.1	127.6	138.9	3.6	3.0	5.9	5.0	9.4	8.0	20.7	17.5
8 - Worcester East	70.9	72.9	74.4	76.6	83.4	1.9	2.7	3.5	4.9	5.6	7.9	12.4	17.5
9 - Bromyard	17.5	17.9	18.1	18.4	19.9	0.4	2.0	0.6	3.4	0.9	5.1	2.3	13.4
10 - Sout Worc Rural West	25.6	26.5	27.0	27.5	29.8	0.9	3.7	1.4	5.4	1.9	7.6	4.2	16.5
11 - Great Malvern	85.7	88.9	91.1	94.4	103.2	3.2	3.7	5.3	6.2	8.6	10.1	17.5	20.4
12 - Ledbury	34.2	34.8	35.4	36.1	39.1	0.6	1.9	1.2	3.5	1.9	5.6	4.9	14.2
13 - Upton-upon-Severn	29.3	30.6	31.4	32.2	34.9	1.3	4.4	2.0	6.9	2.8	9.6	5.6	19.0
14 - Tewkesbury	58.1	61.9	64.1	67.2	74.1	3.7	6.4	5.9	10.2	9.1	15.6	15.9	27.4
15 - Droitwich	80.7	83.7	85.5	88.0	95.8	3.1	3.8	4.8	6.0	7.3	9.1	15.1	18.7
16 - Pershore	72.9	75.2	76.4	78.0	84.4	2.4	3.3	3.5	4.8	5.1	7.0	11.5	15.8
17 - Evesham	120.3	124.7	127.5	131.2	142.9	4.4	3.6	7.2	6.0	10.9	9.1	22.5	18.7
Total	1,183	1,222	1,246	1,280	1,392	38.5	3.3	62.9	5.3	96.7	8.2	208.3	17.6

Notes

[1] to [5] Calculated by multiplying population (Table 1) by per capita convenience goods expenditure (Table 4)

[6] = [2] - [1]

[7] = [6] / [1]

[8] = [3] - [1]

[9] = [8] / [1]

[10] = [4] - [1]

[11] = [10] / [1]

[12] = [5] - [1]

[13] = [12] / [1]

2017 Prices



Appendix Hii: Statistical Tables – Convenience Goods Retail Capacity



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY

Table 1: Main and Top Up Food Shopping Market Share of Convenience Facilities by Zone, 2019 (%)

	1		2		3		4		5		6		7		8		9		10		11		12		13		14		15		16		17	
	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up		
WORCESTER CITY	2%		1%				1%		41% 21%		90% 86%		98% 93%		96% 94%		9%		26% 9%		9%		1%		14% 1%				13% 7%		24% 15%			
City Centre									1% 2%		1% 9%		4% 3%		1% 5%				1%										2% 3%		1%			
Marks & Spencer, High Street									0% 1%				1% 1%		0%														1%		7%			
Iceland, Friary Walk, Crown Gate Centre									0%		1%		7%		2%		1%		3%		1%						1%		3%					
Tesco Express, Foregate Street											1%		2%		1%		0%		2%												1%			
Other	2%		1%		1%		40% 20%		89% 77%		94% 90%		95% 89%		9%		25% 9%		9%		1%		3%		14% 1%				10% 4%		24% 14%			
Asda, Silver Street							0% 2%		2% 1%		14% 5%		8% 1%		2%		2%		1%		1%		1%		3%		1%		1%		1%		1%	
Aldi, Bath Road, St Peters							3%		5%		1%		19%		21%		1%		1%				1%		3%				7%		0%		1%	
Aldi, Pheasant Street													3%		0%		1%		4%										2%		1%			
Aldi, Tybridge Street							16%		7%		27%		16%		2%		0%		1%		4%								1%		2%		3%	
Lidl, Blackpole Road							2%				8%		9%		1%		1%		1%										1%		3%			
Lidl, Newtown Road							0%		3%		3%		2%		2%		2%												1%		3%			
Sainsbury's, Swanpool Walk, St Johns					1%		6%		4%		22%		28%		3%		2%		1%		7%		5%		2%		0%		1%		1%		1%	
Sainsbury's, Windermere Drive, Blackpole							6%				15%		5%		1%		0%				0%				2%		0%		1%		1%		1%	
Tesco, Hill Wood Drive, Warndon							1%		0%		1%		31%		25%		3%		3%		0%				1%		1%		4%		1%		1%	
Tesco, St. Peters Drive							3%		20%		1%		3%		6%		50%		49%		4%		7%		3%		6%		1%		2%		6%	
Waitrose, London Road			1%		1%		1%		6%		1%		3%		11%		6%		5%		4%		1%		7%		2%		1%		2%		4%	
Sainsbury's Local, Barbourne Road													3%		12%																			
Co-op, Ombersley Road									2%				3%		10%						1%													
Co-op, The Bullring, St Johns							1%		0%		9%		10%		2%		13%		3%		6%		0%											
Co-op, Canada Way, Lower Wick									5%												1%													
Other													2%		13%		3%		6%		0%		1%											
WYCHAVON DISTRICT	2%		0% 3%		1%		13% 3%		0%		0%		0%		1%		1%		1%				1%		7%		1%		77%		86%		71% 81%	
Evesham Town Centre																									1%				13%		2%		20% 18%	
Aldi, Swan Lane																									0%				7%		1%		18%	
Waitrose, Merstow Green																									1%				5%		1%		1%	
Co-op, High Street																													1%		0%		3%	
Iceland, High Street																													1%		1%		0%	
Other																															7%			
Evesham Other													0%		0%										4%				34%		12%		77% 75%	
Morrisons, Davies Road																									1%				3%		1%		30%	
Tesco, Worcester Road																									2%				24%		5%		27%	
Lidl, Broadway Road																													1%		1%		17%	
M&S Simply Food, Evesham Shopping Park																													1%		2%		2%	
Tesco Express (Esso), Cheltenham Road																									1%				6%		6%		5%	
Co-op (Petrol Station), A46 Evesham Bypass																									1%						4%		1%	
Co-op, Davies Road																															1%		8%	
Other																															1%		9%	
Droitwich Town Centre	1%		1%		1%		11% 3%		0%		0%				1%														55% 56%				1%	
Waitrose, Salfway							9%		3%		0%																		16%		17%		1%	
Morrisons, Covercroft							2%				0%																		38%		34%		1%	
Other																													0%		5%			
Droitwich Other	1%		0% 3%		2%		2%								1%				1%										23%		30%			
Aldi, Kidderminster Road, Droitwich							2%												1%										22%		5%			
Sainsbury's Local, Worcester Road																													0%		8%		12%	
Tesco Express, Mulberry Tree Hill	1%																														5%			
Other																													0%		12%		5%	
Pershore Town Centre																									1%		2%		1%		1%		0%	
Asda, King George's Way																															19%		40%	
Tesco Express, High Street																															19%		31%	
Other																															1%		6%	
Pershore Other																															4%		14%	
Co-op, Racecourse Road																															4%		13%	
Other																															4%		2%	
Other in Wychavon District													1%																		0%		12%	
Other in Wychavon District																																	6%	
MALVERN HILLS DISTRICT	2% 5%				68% 89%		8% 48%		10% 14%		2% 2%		2% 3%		6%		60% 63%		87% 99%		6% 3%		39% 58%				1%		1%					
Great Malvern Town Centre							1%		2%				0%		2%		20% 12%		29% 18%		1% 1%		10% 4%						0%					
Waitrose, Edith Walk							2%						0%		2%		20%		12%		25%		16%		1%		10%		3%		1%			
Iceland, Church Street							1%										1%						2%		1%		2%		1%					
Other																																		
Barnards Green							0%		0%										5%		18%		0%		7%									
Co-op, Barnards Green Road,							0%												5%		16%		0%		7%									
One Stop, Barnards Green Road																			1%															
Malvern Link							0%		1%								7%		2%		12%		20%		1%		1%		3%		1%			
Lidl, Worcester Road							0%										7%		1%		10%		15%		3%		1%		3%		1%			
Co-op, Worcester Road,									1%										1%				4%		2%									
Other																							2%											
Other Malvern							2%		8% 11%		2% 2%		1% 1%		2%		33% 37%		41% 37%		4%		18% 8%				1%		0%					
Morrisons, Roman Way							2%		6%		8%		1%		1%		2%		31%		17%		38%		19%		4%		16%		4%		1%	
Marks & Spencer, Malvern Retail Park							2%		3%		1%		2%		1%		1%		2%		14%		1%		5%		3%		1%		0%			
Sainsbury's Local, Buttercup Walk																			1%				0%		6%									
Tesco Express, Pickersleigh Road																	4%		2%		6%		3%				3%							
Tenbury Wells Town Centre	2%		1%		68% 84%		3% 3%		3% 1%				1%				1%		1%															
Tesco, Temes Street					44%		40%		3%		1%																							
Nisa, Market Square					13%		16%		0%		2%																							
Other	0%		1%		11%		28%																1%											
Tenbury Other					1%		6%		0%										1%															
Co-op, Bromyard Road, Tenbury Wells					1%		6%		0%										1%															
Upton-upon-Severn Town Centre																									7%		32%				1%			
Co-op, Old Street																																		

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY

Table 2: Main and Top Up Food Shopping Turnover of Convenience Facilities, 2019 (£m)

	1		2		3		4		5		6		7		8		9		10		11		12		13		14		15		16		17		
	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up			
WORCESTER CITY	0.1		0.3				0.0		7.0 0.6		54.3 10.4		98.6 16.3		57.2 10.7		1.4		5.8 0.3		6.5		0.2 0.2		3.4 0.0				8.4 1.0		15.5 1.2				
City Centre									0.1 0.1		0.4 1.0		3.6 0.5		0.4 0.6				0.2										1.5 0.4		0.1				
Marks & Spencer, High Street									0.1 0.0				1.4 0.2		0.2														0.5						
Island, Friary Walk, Crown Gate Centre									0.1		0.4 0.8		1.6		0.1		0.3		0.1										1.0 0.4						
Tesco Express, Foregate Street													0.2 0.7		0.2		0.1		0.1												0.1				
Other	0.1		0.3				0.0		6.9 0.6		53.9 9.3		95.0 15.8		56.8 10.2		1.4		5.6 0.3		6.5		0.2 0.2		3.4 0.0				6.9 0.6		15.5 1.1				
Asda, Silver Street									0.1 0.1		1.2 0.1		14.0 0.9		4.8 0.2		0.4		0.6										0.9 0.1		0.5				
Aldi, Bath Road, St Peters									0.5		3.2		1.4		11.1 2.4		0.1		0.2		0.6				0.7						4.7		0.1		
Aldi, Pheasant Street													3.3		0.3														0.2		0.1				
Aldi, Tybridge Street									2.8 0.2		16.6 1.9		1.6		0.2		0.2		0.8												0.6		1.2		
Lidl, Blackpole Road									0.3				8.5 1.5		0.8 0.1		0.2		0.1												0.7 0.3				
Lidl, Newtown Road									0.1		1.6		3.1 0.4		1.3 0.2		0.1		1.5 0.2										0.6		0.7 0.3				
Sainsbury's, Swanpool Walk, St Johns							0.0		1.1 0.1		13.2 3.4		2.7		1.0 0.1		0.1								0.5				0.3		0.5		0.5		
Sainsbury's, Windermere Drive, Blackpole									1.1				15.0 0.8		0.4		0.0				0.3				0.1				0.9 0.1		0.6 0.1		0.5 0.1		
Tesco, Hill Wood Drive, Warndon									0.1		0.2 0.1		31.4 4.4		1.5 0.4		0.6		1.5 0.1		4.2		0.2		1.7				2.3 0.1		4.1 0.7				
Tesco, St. Peters Drive									0.5		12.0		3.0 1.0		30.1 5.6		0.6		1.5 0.1		0.9		0.2		0.4				0.8 0.2		2.6				
Waitrose, London Road									0.1		3.6 0.1		3.7 0.3		3.3 0.5																				
Sainsbury's Local, Barbourne Road													2.6 2.0																						
Co-op, Ombersley Road									0.1				3.0 2.1																						
Co-op, The Bullring, St Johns									0.2				2.0 1.4						0.2																
Co-op, Canada Way, Lower Wick											0.1		1.2		1.7 2.2		2.0 0.7		0.0		0.0						0.0				0.8				
Other																																			
WYCHAVON DISTRICT	0.4		0.7	1.1			0.2		2.3	0.1	0.2		0.3		0.2	0.1	0.1		0.3					0.3		3.4	0.1	51.5	12.2	46.0	6.7	101.8	15.4		
Evesham Town Centre																												0.7		8.6	0.2	20.6	2.7		
Aldi, Swan Lane																												0.2		4.3	0.1	18.9	1.0		
Waitrose, Merstow Green																												0.6		3.4		1.2	0.1		
Co-op, High Street																														0.4		0.3	0.5		
Island, High Street																														0.5	0.1	0.3			
Other																																	1.1		
Evesham Other																0.2												1.8			21.9	1.0	80.9	11.6	
Morrisons, Davies Road																0.2												0.3		2.2	0.1	31.1	3.7		
Tesco, Worcester Road																													1.2		15.3	0.4	27.9	1.4	
Lidl, Broadway Road																														0.4	0.1	18.3	1.9		
M&S Simply Food, Evesham Shopping Park																														0.4	0.1	1.9	0.3		
Tesco Express (Esso), Cheltenham Road																															3.7		0.8		
Co-op (Petrol Station), A46 Evesham Bypass																																0.4		0.9	
Co-op, Davies Road																																	1.1	1.2	
Other																															0.5			0.5	1.4
Droitwich Town Centre	0.1						0.2		2.0	0.1	0.2		0.3				0.1												36.4	7.9			0.1		
Waitrose, Saltway	0.1						0.2		1.5 0.1	0.2			0.3				0.1													10.9 2.4			0.1		
Morrisons, Covercroft									0.4																					25.2 4.7					
Other																														0.3	0.7				
Droitwich Other	0.2		0.7	1.1					0.3										0.3											15.1	4.3				
Aldi, Kidderminster Road, Droitwich									0.3																					14.8	0.8				
Sainsbury's Local, Worcester Road																															1.1				
Tesco Express, Mulberry Tree Hill	0.2																													0.3	1.7				
Other																														0.7					
Pershore Town Centre																										0.3		0.9	0.1			12.6	3.3	0.3	
Asda, King George's Way																										0.3		0.9	0.1			12.2	2.5	0.3	
Tesco Express, High Street																																	0.3		
Other																																	0.4	0.5	
Pershore Other																																	2.6	1.2	
Co-op, Racecourse Road																																	2.6	1.0	
Other																																	0.1		
Other in Wychavon District															0.1																	0.2	1.0		1.0
MALVERN HILLS DISTRICT	0.5	0.1					11.1	2.2	1.4	1.4	6.0	1.7	1.7	0.4	1.0	0.3	0.9		13.5	2.0	65.5	10.5	1.6	0.2	9.6	2.8			0.1	0.4	0.1				
Great Malvern Town Centre											0.0						0.2		4.5 0.4		21.8 1.9		0.4 0.0	2.5 0.2							0.2				
Waitrose, Edith Walk							</																												

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Table 3: Total Turnover of Convenience Facilities, 2019

	1		2		3		4		5		6		7		8		Zone		10		11		12		13		14		15		16		17		Total Survey Derived Turnover (£m)			
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m						
WORCESTER CITY	0	0.1	0	0.3			0	0.0	38	7.6	89	64.7	97	114.9	96	67.9	8	1.4	24	6.1	8	6.5	1	0.4	12	3.4			12	9.5	23	16.7		299.4				
City Centre									1	0.2	2	1.4	3	4.1	1	0.9			1	0.2									2	1.9	0	0.1		8.8				
Marks & Spencer, High Street									0	0.1			1	1.5	0	0.2													1	0.5				2.3				
Iceland, Friary Walk, Crown Gate Centre									0	0.1	2	1.2	1	1.6	0	0.3			0	0.1									2	1.4				4.6				
Tesco Express, Foregate Street									0	0.0	0	0.2	1	0.8	0	0.3			1	0.1											0	0.1		1.5				
Other	0	0.1	0	0.3			0	0.0	37	7.5	87	63.2	94	110.8	94	67.0	8	1.4	23	5.9	8	6.5	1	0.4	12	3.4			9	7.5	23	16.6		290.6				
Asda, Silver Street									1	0.1	2	1.3	13	14.9	7	5.0			1	0.4	1	0.6							1	1.1				23.8				
Aldi, Bath Road, St Peters									3	0.5	4	3.2	1	1.4	19	13.5	1	0.1	1	0.2	1	0.6			2	0.7			1	0.5				25.0				
Aldi, Pheasant Street													3	3.3	0	0.3														7	4.7			3.9				
Aldi, Tybridge Street									15	3.0	26	18.5	1	1.6	0	0.2	1	0.2	3	0.8														24.4				
Lidl, Blackpole Road									2	0.3			8	10.0	1	0.9	1	0.2	1	0.1										1	0.6	2	1.2		13.4			
Lidl, Newtown Road									0	0.1	2	1.6	3	3.5	2	1.5														1	1.0			7.7				
Sainsbury's, Swanpool Walk, St Johns									6	1.2	23	16.6	2	2.7	1	1.0	1	0.1	7	1.7			2	0.5					0	0.3	1	0.5		24.6				
Sainsbury's, Windermere Drive, Blackpole							0	0.0	5	1.1			13	15.8	1	0.4	0	0.0			0	0.3			0	0.1			1	1.1	1	0.5		19.2				
Tesco, Hill Wood Drive, Warndon									1	0.1	0	0.3	30	35.8	3	1.9													3	2.7	1	0.6		41.4				
Tesco, St. Peters Drive									2	0.5	17	12.0	3	4.0	50	35.7	4	0.6	6	1.6	5	4.2			6	1.7				6	4.7				65.0			
Waitrose, London Road									1	0.1	5	3.7	4	4.6	5	3.9			3	0.9	1	0.9	1	0.2	1	0.4			1	1.0	4	2.6		18.1				
Sainsbury's Local, Barbourne Road	0	0.1																																	4.8			
Co-op, Ombersley Road									0	0.1																									5.2			
Co-op, The Bullring, St Johns									1	0.2			5	3.3					1	0.2														3.7				
Co-op, Canada Way, Lower Wick													2	1.3																					1.3			
Other									1	0.1	2	1.2	3	4.0	4	2.7	0	0.0	0	0.0					0	0.0					1	0.8			9.0			
WYCHAVON DISTRICT	2	0.4	1	1.8			1	0.2	12	2.4	0	0.2	0	0.3	0	0.3	1	0.1	1	0.3					1	0.3	6	3.5	79	63.7	72	52.6	97	117.2	243.2			
Evesham Town Centre																											1	0.7			12	8.8	19	23.3		32.9		
Aldi, Swan Lane																											0	0.2			6	4.4	17	19.9		24.5		
Waitrose, Merstow Green																											1	0.6			5	3.4	1	1.3		5.3		
Co-op, High Street																															1	0.4	1	0.8		1.2		
Iceland, High Street																															1	0.6	0	0.3		0.9		
Other																																1	1.1				1.1	
Evesham Other																0	0.2										3	1.8			31	22.9	77	92.5		117.4		
Morrisons, Davies Road																0	0.2												1	0.3			3	2.2	29	34.8	37.5	
Tesco, Worcester Road																											2	1.2			21	15.7	24	29.4		46.2		
Lidl, Broadway Road																														1	0.5	17	20.2		20.7			
M&S Simply Food, Evesham Shopping Park																														1	0.5	2	2.3		2.8			
Tesco Express (Esso), Cheltenham Road																											1			5	3.7	1	0.9		4.9			
Co-op (Petrol Station), A46 Evesham Bypass																														0	0.4	1	0.8		1.1			
Co-op, Davies Road																																2	2.3				2.3	
Other																															2	1.9				1.9		
Droitwich Town Centre	1	0.1					1	0.2	10	2.1	0	0.2	0	0.3			1	0.1											55	44.3			0	0.1		47.4		
Waitrose, Saltway	1	0.1					1	0.2	8	1.6																			17	13.4			0	0.1		15.7		
Morrisons, Covercroft									2	0.4			0	0.2															37	29.9					30.6			
Other																													1	1.0					1.0			
Droitwich Other	1	0.2	1	1.8					2	0.3										1	0.3								24	19.4					22.1			
Aldi, Kidderminster Road, Droitwich																														19	15.6					18.1		
Sainsbury's Local, Worcester Road																														1	1.1					1.1		
Tesco Express, Mulberry Tree Hill	1	0.2																												3	2.0					2.3		
Other																														1	0.7					0.7		
Pershore Town Centre																											1	0.3	2	1.0			22	15.9	0	0.3		17.4
Asda, King George's Way																											1	0.3	2	1.0			20	14.7	0	0.3		16.2
Tesco Express, High Street																															0	0.3				0.3		
Other																															1	0.9				0.9		
Pershore Other																																						

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Table 4. Survey-derived performance of convenience floorspace compared to expected benchmark performance at 2019

	Gross Floorspace (sq.m)	Net Sales (sq.m)	Net Convenience Sales Area (sq.m)	Sales Density (£ per sq.m)	Benchmark Convenience Goods Turnover (£m)	Survey Turnover (£m)	Estimated Turnover from Outside Survey Area (£m)	Estimated Total Turnover (£m)	Overtrading (£m)
WORCESTER CITY					305.1	299.4	1.2	300.6	-4.6
City Centre									
Marks & Spencer, High Street	-	500	500	10,176	5.1	2.3	0.4	2.7	-2.4
Iceland, Friary Walk, Crown Gate Centre	709	456	456	6,662	3.0	4.6		4.6	1.6
Tesco Express, Foregate Street	364	254	254	13,402	0.4	0.4	0.0	0.4	0.0
Other	-	-	-	-	1.5	1.5	0.3	1.8	
Other									
Asda, Silver Street	7,494	4,302	3,745	13,268	49.7	23.8	0.5	24.3	-25.4
Aldi, Bath Road, St Peters	1,448	1,005	917	10,517	9.6	25.0		25.0	15.3
Aldi, Pheasant Street	1,969	1,307	1,246	10,517	13.1	3.9		3.9	-9.2
Aldi, Tybridge Street	1,448	1,005	917	10,517	9.6	24.4		24.4	14.7
Lidl, Blackpole Road	2,251	1,594	1,425	8,571	12.2	13.4		13.4	1.2
Lidl, Newtown Road	1,312	897	846	8,571	7.2	7.7		7.7	0.4
Sainsbury's, Swanpool Walk, St Johns	3,830	2,781	1,995	11,356	22.7	24.6		24.6	2.0
Sainsbury's, Windermere Drive, Blackpole	4,590	2,691	2,363	11,356	26.8	19.2		19.2	-7.6
Tesco, Mill Wood Drive, Warndon	6,586	3,825	3,433	13,402	46.0	41.4		41.4	-4.6
Tesco, St. Peters Drive	6,785	4,016	3,350	13,402	44.9	65.0		65.0	20.1
Waitrose, London Road	3,156	1,805	1,668	12,569	21.0	18.1		18.1	-2.9
Sainsbury's Local, Barbourne Road	351	190	190	11,356	2.2	4.8		4.8	2.7
Co-op, Ombersley Road	894	583	514	10,514	5.4	5.2		5.2	-0.2
Co-op, The Bullring, St Johns	2,373	1,377	1,233	10,514	13.0	3.7		3.7	-9.2
Co-op, Canada Way, Lower Wick	398	260	260	10,514	2.7	1.3		1.3	-1.5
Other	-	-	-	-	9.0	9.0		9.0	
WYCHAVON DISTRICT					226.9	243.2	1.1	244.3	17.4
EVESHAM					141.7	150.3	0.6	150.8	9.1
Evesham Town Centre									
Aldi, Swan Lane	1,963	1,362	1,243	10,517	13.1	24.5	0.2	24.7	11.6
Waitrose, Merstow Green	2,656	1,700	1,530	12,569	19.2	5.3	0.3	5.5	-13.7
Co-op, High Street	1,516	989	864	10,514	9.1	1.2	0.0	1.2	-7.8
Iceland, High Street	580	267	267	6,662	1.8	0.9	0.0	0.9	-0.9
Other	-	-	-	-	1.1	1.1	0.0	1.1	0.0
Evesham Other									
Morrisons, Davies Road	5,287	3,094	2,573	12,293	31.6	37.5		37.5	5.9
Tesco, Worcester Road	6,881	4,230	3,377	13,402	45.3	46.2		46.2	0.9
Lidl, Broadway Road	2,418	1,424	1,139	8,571	9.8	20.7		20.7	11.0
M&S Simply Food, Evesham Shopping Park	1,004	609	493	10,176	5.0	2.8		2.8	-2.3
Tesco Express (Esso), Cheltenham Road	130	116	116	10,514	1.2	4.9		4.9	3.7
Co-op (Petrol Station), A46 Evesham Bypass	130	84	84	10,514	0.9	1.1		1.1	0.2
Co-op, Davies Road	264	172	172	10,514	1.8	2.3		2.3	0.5
Other	-	-	-	-	1.9	1.9		1.9	
DROITWICH					55.5	69.5	0.3	69.7	14.3
Droitwich Town Centre									
Waitrose, Saltway	3,262	2,002	1,767	12,569	22.2	15.7	0.1	15.8	-6.4
Morrisons, Covercroft	2,715	1,578	1,455	12,293	17.9	30.6	0.2	30.8	12.9
Other	-	-	-	-	1.0	1.0	0.0	1.1	0.0
Droitwich Other									
Aldi, Kidderminster Road, Droitwich	1,527	1,059	966	10,517	10.2	18.1		18.1	7.9
Sainsbury's Local, Worcester Road	130	116	116	11,356	1.3	1.1		1.1	-0.2
Tesco Express, Mulberry Tree Hill	338	163	163	13,402	2.2	2.3		2.3	0.1
Other	-	-	-	-	0.7	0.7		0.7	
PERSHORE					29.7	21.3	0.2	21.5	-8.2
Pershore Town Centre									
Asda, King George's Way	2,361	1,719	1,351	13,268	17.9	16.2	0.2	16.4	-1.5
Tesco Express, High Street	515	278	278	13,402	3.7	0.3	0.0	0.3	-3.4
Other	-	-	-	-	0.9	0.9	0.0	1.0	0.0
Pershore Other									
Co-op, Racecourse Road	1,157	755	665	10,514	7.0	3.7		3.7	-3.3
Other	-	-	-	-	0.1	0.1		0.1	
Other in Wychavon District	-	-	-	-	2.2	2.2		2.2	
MALVERN HILLS DISTRICT					136.7	135.2	2.7	137.9	1.2
MALVERN					95.0	112.7	1.7	114.4	19.4
Great Malvern Town Centre									
Waitrose, Edith Walk	4,033	2,307	2,018	12,569	25.4	30.2	1.6	31.7	6.4
Iceland, Church Street	1,039	428	426	6,662	2.8	1.3		1.3	-1.5
Other	-	-	-	-	2.0	2.0	0.1	2.1	0.1
Barnards Green									
Co-op, Barnards Green Road,	732	366	366	10,514	3.8	5.8		5.8	1.9
Other	-	-	-	-	0.1	0.1		0.1	
Malvern Link									
Lidl, Worcester Road	1,243	881	804	8,571	6.9	12.1		12.1	5.3
Co-op, Worcester Road	851	555	489	10,514	5.1	1.4		1.4	-3.8
Other	-	-	-	-	0.3	0.3		0.3	
Other Malvern									
Morrisons, Roman Way	6,365	3,725	3,098	12,293	38.1	50.6		50.6	12.5
Marks & Spencer, Malvern Retail Park	494	296	240	10,176	2.4	5.7		5.7	3.2
Sainsbury's Local, Buttercup Walk	379	205	205	11,356	2.3	0.4		0.4	-1.9
Tesco Express, Pickersleigh Road	373	261	261	13,402	3.5	0.7		0.7	-2.8
Other	-	-	-	-	2.1	2.1		2.1	
TENBURY					35.0	15.4	0.8	16.2	-18.8
Tenbury Wells Town Centre									
Tesco, Teme Street	4,889	3,006	2,100	13,402	28.1	9.8	0.6	10.4	-17.8
Other	-	-	-	-	5.2	5.2	0.2	5.5	0.2
Tenbury Other									
Co-op, Bromyard Road, Tenbury Wells	292	175	154	10,514	1.6	0.4		0.4	-1.2
UPTON-UPON-SEVERN					3.0	3.4	0.2	3.6	0.6
Upton-upon-Severn Town Centre									
Co-op, Old Street	305	199	175	10,514	1.8	2.2	0.1	2.3	0.5
Other	-	-	-	-	1.2	1.2	0.1	1.2	0.1
Other in Malvern Hills District	-	-	-	-	3.7	3.7		3.7	
SOUTH WORCESTERSHIRE					668.8	677.8	5.0	682.8	14.0

Notes:
Gross floorspace derived from Retail Studies, Retail Impact Assessments, VOA website, Experian Goad or WYG assessment
Net convenience floorspace derived from above sources where available or based on WYG professional judgement having regard to Experian Goad Data/WYG visits
Sales densities derived from information provided by GlobalData and Mintel Retail Rankings.
It has been assumed that all unnamed convenience stores within a centre are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey)
Survey derived performance of stores calculated by adding together 'main' and 'top up' turnover as set out in Table 3

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY

TABLE 5: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN WORCESTER

Table 5a: Estimated 'Capacity' for Convenience Goods Facilities - Worcester

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	305.1	299.4	1.2	-4.6
2025	308.8	309.1	1.2	1.5
2029	308.8	315.3	1.3	7.7
2035	308.8	323.8	1.3	16.3
2041	308.8	352.1	1.4	44.7

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Worcester facilities

2017 Prices

Table 5b: Quantitative Need for Additional Convenience Goods Floorspace - Worcester

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	-4.6	-
2025	1.5	100
2029	7.7	700
2035	16.3	1,500
2041	44.7	4,000

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY

TABLE 6: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN EVESHAM

Table 6a: Estimated 'Capacity' for Convenience Goods Facilities - Evesham

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	141.7	150.3	0.6	9.1
2025	143.5	155.2	0.6	12.3
2029	143.5	158.2	0.6	15.4
2035	143.5	162.5	0.6	19.7
2041	143.5	176.7	0.7	33.9

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Evesham facilities

2017 Prices

Table 6b: Quantitative Need for Additional Convenience Goods Floorspace in Evesham - Pre-Commitments

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	9.1	800
2025	12.3	1,100
2029	15.4	1,400
2035	19.7	1,800
2041	33.9	3,000

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

Table 6c: Extant Convenience Goods Commitments in Evesham

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Convenience Turnover (£m)	Status
Sinclair Retail Park, Evesham	17/01606 & 16/01418/PN	Proposed retail development, 10-10A Davies Road, Evesham - Aldi Store	-	1,350	10,517	14.2	Currently being implemented
Total				1,350		14.2	

Notes:

Commitment details provided by Wychavon District Council
 Sales density data derived from GlobalData.com/Mintel Retail Rankings

2017 Prices

Table 6d: Net Quantitative Need for Additional Comparison Goods Floorspace in Evesham - Post Commitments

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)
2019	9.1	14.2	-5.1	-
2025	12.3	14.4	-2.1	-
2029	15.4	14.4	1.0	100
2035	19.7	14.4	5.3	500
2041	33.9	14.4	19.6	1,700

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Residual calculated by subtracting turnover of commitments (sourced from Table 6c) from surplus expenditure (sourced from Table 6b).

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY

TABLE 7: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN DROITWICH

Table 7a: Estimated 'Capacity' for Convenience Goods Facilities - Droitwich

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	55.5	69.5	0.3	14.3
2025	56.1	71.7	0.3	15.9
2029	56.1	73.2	0.3	17.3
2035	56.1	75.2	0.3	19.3
2041	56.1	81.7	0.3	25.9

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Droitwich facilities

2017 Prices

Table 7b: Quantitative Need for Additional Convenience Goods Floorspace in Droitwich - Pre-Commitments

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	14.3	1,300
2025	15.9	1,400
2029	17.3	1,500
2035	19.3	1,700
2041	25.9	2,300

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived by GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

Table 7c: Extant Convenience Goods Commitments in Droitwich

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Convenience Turnover (£m)	Status
George Bayliss Road, Droitwich	17/02331/FUL	Demolition of existing buildings and erection of a Class A1 Lidl retail foodstore with associated car parking, access, landscaping and associated engineering works	2,125	1,060	8,571	9.1	Currently being implemented
Total				1,060		9.1	

Notes:

Commitment details provided by Wychavon District Council
 Sales density derived from GlobalData.com/Mintel Retail Rankings

2017 Prices

Table 7d: Net Quantitative Need for Additional Comparison Goods Floorspace in Droitwich - Post Commitments

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)
2019	14.3	9.1	5.2	500
2025	15.9	9.2	6.7	600
2029	17.3	9.2	8.1	700
2035	19.3	9.2	10.1	900
2041	25.9	9.2	16.7	1,500

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Residual calculated by subtracting turnover of commitments (sourced from Table 6c) from surplus expenditure (sourced from Table 6b).

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY



TABLE 8: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN PERSHORE

Table 8a: Estimated 'Capacity' for Convenience Goods Facilities - Pershore

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	29.7	21.3	0.2	-8.2
2025	30.1	22.0	0.2	-7.9
2029	30.1	22.4	0.2	-7.4
2035	30.1	23.0	0.2	-6.8
2041	30.1	25.0	0.3	-4.8

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Pershore facilities

2017 Prices

Table 8b: Quantitative Need for Additional Convenience Goods Floorspace - Pershore

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	-8.2	-
2025	-7.9	-
2029	-7.4	-
2035	-6.8	-
2041	-4.8	-

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY



TABLE 9: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN MALVERN

Table 9a: Estimated 'Capacity' for Convenience Goods Facilities - Malvern

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	95.0	112.7	1.7	19.4
2025	96.1	116.3	1.7	22.0
2029	96.1	118.6	1.8	24.3
2035	96.1	121.9	1.8	27.6
2041	96.1	132.5	2.0	38.4

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Malvern facilities

2017 Prices

Table 9b: Quantitative Need for Additional Convenience Goods Floorspace - Malvern

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	19.4	1,800
2025	22.0	2,000
2029	24.3	2,200
2035	27.6	2,500
2041	38.4	3,400

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY

TABLE 10: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN TENBURY WELLS

Table 10a: Estimated 'Capacity' for Convenience Goods Facilities - Tenbury Wells

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	35.0	15.4	0.8	-18.8
2025	35.4	15.9	0.9	-18.7
2029	35.4	16.2	0.9	-18.3
2035	35.4	16.6	0.9	-17.9
2041	35.4	18.1	1.0	-16.3

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Tenbury Wells facilities

2017 Prices

Table 10b: Quantitative Need for Additional Convenience Goods Floorspace - Tenbury Wells

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	-18.8	-
2025	-18.7	-
2029	-18.3	-
2035	-17.9	-
2041	-16.3	-

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
CONVENIENCE GOODS CAPACITY



TABLE 11: ESTIMATED CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN UPTON-UPON-SEVERN

Table 11a: Estimated 'Capacity' for Convenience Goods Facilities - Upton-upon-Severn

Year	Benchmark Turnover £m ¹	Turnover £m ²	Estimated Inflow £m	Surplus Expenditure £m
2019	3.0	3.4	0.2	0.6
2025	3.1	3.5	0.2	0.7
2029	3.1	3.6	0.2	0.7
2035	3.1	3.7	0.2	0.8
2041	3.1	4.0	0.2	1.2

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16
2. Assumes constant market share claimed by Upton-upon-Severn facilities

2017 Prices

Table 11b: Quantitative Need for Additional Convenience Goods Floorspace - Upton-upon-Severn

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	0.6	100
2025	0.7	100
2029	0.7	100
2035	0.8	100
2041	1.2	100

Notes:

Average sales density assumed to be £11,057 per sq.m (@2019) based on the average sales density of all grocery operators - derived from GlobalData.com
 Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16

2017 Prices



Appendix Hiii: Statistical Tables – Comparison Goods Retail Capacity





Table 1: Market Share of clothing and footwear goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	15	15	16	17
WORCESTER CITY	13%	10%	3%	20%	67%	74%	87%	71%	29%	38%	27%	3%	12%	1%	60%	51%	14%
Worcester City Centre	13%	10%	3%	20%	66%	70%	87%	67%	27%	38%	27%	3%	11%	1%	60%	51%	14%
Worcester Out-of-Centre Blackpole Retail Park, Blackpole Road Elgar Retail Park, Blackpole Road Hyito Road Retail Park Shrub Hill Retail Park, Tallow Hill Other Out-of-Centre						2%		3%									
						2%											
								3%									
Local Centres					1%	3%		1%	2%				1%				
WYCHAVON DISTRICT	1%		3%				1%	3%		1%	1%		2%	1%	25%	19%	28%
Evesham Town Centre			2%													3%	22%
Evesham Out-of-Centre Evesham Retail Park, Worcester Road Four Pools Retail Park, The Link The Valley Other Out-of-Centre			1%								1% 1%					7% 3%	5% 3%
			1%													2% 2%	1% 1%
Droitwich Town Centre	1%						1%	2%							24%		
Droitwich Out-of-Centre Droitwich Spa Retail Park, Kidderminster Road Roman Way Retail Park, Kidderminster Road Other															1%		
															1%		
Pershore Town Centre													2%	1%		9%	1%
Other within Wychavon								1%		1%							1%
MALVERN HILLS DISTRICT		2%		7%	4%	22%	4%	17%	11%	38%	56%	38%	31%		2%	3%	
Great Malvern Town Centre						2%			1%	11%	15%	12%	10%				
Malvern Out-of-Centre Malvern Shopping Park, Roman Way B&Q, Spring Lane Other		2% 2%			3% 3%	17% 17%	2% 2%	16% 16%	10% 10%	23% 23%	38% 38%	24% 24%	14% 14%		2% 2%	3% 3%	
Barnards Green District Centre, Malvern Malvern Link District Centre, Malvern					1%	4%	2%	1%		4%	4%	1% 1%	7%				
Tenbury Wells Town Centre				7%													
Upton-upon-Severn Town Centre													1%				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	14%	12%	6%	27%	71%	97%	92%	90%	40%	77%	84%	41%	46%	2%	88%	72%	42%
OUTSIDE SOUTH WORCESTERSHIRE	86%	88%	94%	73%	29%	3%	8%	10%	60%	23%	16%	59%	54%	98%	12%	28%	58%
Towns within Survey Area Kidderminster Bromsgrove Stourport-on-Severn Tewkesbury Ledbury Bromyard	62% 61% 1%	63% 53% 10%	27% 3% 24%	21% 21%	13% 5% 8%				4%	2% 1%		8%	5% 1%	24%		1%	
									1% 3%	1%		8%	2% 2%	24%		1%	
Towns outside Survey Area Cheltenham Hereford Redditch Birmingham Bristol Gloucester Leominster Stratford upon Avon Ludlow Other	24%	25%	68%	52%	16%	3% 1%	8%	10% 6%	56% 4% 39%	21% 4% 13%	16% 13%	51% 6% 40%	49% 24%	74% 63%	12%	27% 22%	58% 35%
			23% 27%	25%		1%			2%		1%	1%	1%	1%	5% 2%	3%	3%
	1%	2%			4% 1% 2%		3%		1%	1% 1%	3%	1%	13%	2%	1% 1%	2%	1% 3%
				6%				1%						2%			14%
	5% 19%			5% 16%	2% 7%	1%	5%	3%	3% 6%	1%	2%	3%	11%	7%	3%		1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 2: Market Share of books, CD's, DVD's, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	8%	5%	4%	13%	77%	91%	98%	97%	23%	62%	40%	6%	19%		40%	49%	14%
Worcester City Centre	8%	5%	4%	13%	73%	77%	88%	73%	23%	57%	34%	6%	18%		40%	47%	14%
Worcester Out-of-Centre Blackpole Retail Park, Blackpole Road Elgar Retail Park, Blackpole Road Hyito Road Retail Park Shrub Hill Retail Park, Tallow Hill Other Out-of-Centre						3%	11%	24%			6%		1%			2%	
Local Centres					4%	11%				5%							
WYCHAVON DISTRICT				3%	2%		2%								49%	44%	43%
Evesham Town Centre																13%	31%
Evesham Out-of-Centre Evesham Retail Park, Worcester Road Four Pools Retail Park, The Link The Valley Other Out-of-Centre															2%	7%	12%
Droitwich Town Centre				3%	2%		2%								48%		
Droitwich Out-of-Centre Droitwich Spa Retail Park, Kidderminster Road Roman Way Retail Park, Kidderminster Road Other																	
Pershore Town Centre																24%	
Other within Wychavon																	
MALVERN HILLS DISTRICT				38%		6%			4%	19%	56%	2%	25%			2%	
Great Malvern Town Centre				3%		3%				12%	48%	2%	9%			2%	
Malvern Out-of-Centre Malvern Shopping Park, Roman Way B&Q, Spring Lane Other						2%			4%	5%	2%		7%				
Barnards Green District Centre, Malvern Malvern Link District Centre, Malvern						2%			4%	2%	2%		6%				
Tenbury Wells Town Centre				36%							2%						
Upton-upon-Severn Town Centre													7%				
Other within Malvern District						2%											
SOUTH WORCESTERSHIRE SUB-TOTAL	8%	5%	4%	54%	79%	97%	100%	97%	26%	81%	95%	8%	44%		90%	95%	57%
OUTSIDE SOUTH WORCESTERSHIRE	92%	95%	96%	46%	21%	3%		3%	74%	19%	5%	92%	56%	100%	10%	5%	43%
Towns within Survey Area Kidderminster Bromsgrove Stourport-on-Severn Tewkesbury Ledbury Bromyard	35% 25%	67% 42%	69% 69%	8% 8%	12% 12%				4%			63%	22%	52%	4% 4%		1%
Towns outside Survey Area Cheltenham Hereford Redditch Birmingham Bristol Gloucester Leominster Stratford upon Avon Ludlow Other	57%	28%	27%	38%	9%	3% 2%		3%	69% 64%	19% 12%	5% 2%	30% 3% 25%	34% 10% 11%	48% 42%	6% 2%	5% 3%	42% 21% 4% 2% 13% 2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 3: Market Share of furnishings and household textile goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	7%	8%	14%	5%	59%	87%	95%	83%	24%	50%	34%	2%	15%		68%	34%	16%
Worcester City Centre	5%	3%	3%	2%	14%	28%	15%	28%	6%	34%	9%		4%		25%	11%	8%
Worcester Out-of-Centre	1%	4%	11%	3%	45%	52%	81%	55%	17%	15%	25%	2%	11%		43%	24%	8%
Blackpole Retail Park, Blackpole Road	1%	1%	7%	3%	29%	18%	28%	27%	5%	11%	11%		4%		20%	3%	7%
Elgar Retail Park, Blackpole Road		3%	4%		16%	33%	51%	20%	12%	4%	14%	2%	7%		23%	20%	1%
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill						1%	2%	8%									
Other Out-of-Centre																	
Local Centres						6%				1%							
WYCHAVON DISTRICT	3%		11%		4%	2%	1%							1%	18%	21%	37%
Evesham Town Centre																3%	26%
Evesham Out-of-Centre					4%											13%	11%
Evesham Retail Park, Worcester Road																8%	7%
Four Pools Retail Park, The Link																3%	3%
The Valley					4%											1%	1%
Other Out-of-Centre																	
Droitwich Town Centre	2%		1%			2%	1%								13%		
Droitwich Out-of-Centre	2%		10%												5%		
Droitwich Spa Retail Park, Kidderminster Road			1%												1%		
Roman Way Retail Park, Kidderminster Road	2%		9%												4%		
Other																	
Pershore Town Centre														1%		5%	
Other within Wychavon																	
MALVERN HILLS DISTRICT				5%	8%	5%	1%	5%	1%	18%	51%	5%	36%			1%	
Great Malvern Town Centre							1%			11%	20%	1%	16%			1%	
Malvern Out-of-Centre						4%		4%	1%	3%	27%	4%	11%				
Malvern Shopping Park, Roman Way						4%		4%	1%		23%	4%	11%				
B&Q, Spring Lane										1%							
Other										1%	5%						
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern				2%		1%				3%	4%		8%				
Tenbury Wells Town Centre				2%				1%									
Upton-upon-Severn Town Centre																	
Other within Malvern District				2%	8%					1%							
SOUTH WORCESTERSHIRE SUB-TOTAL	10%	8%	25%	10%	71%	94%	97%	88%	25%	68%	84%	7%	51%	1%	86%	56%	53%
OUTSIDE SOUTH WORCESTERSHIRE	90%	92%	75%	90%	29%	6%	3%	12%	75%	32%	16%	93%	49%	99%	14%	44%	47%
Towns within Survey Area	70%	79%	25%	41%	17%	1%		3%	4%	1%		19%	2%	12%	6%		
Kidderminster	69%	77%	3%	39%	14%	1%		3%							2%		
Bromsgrove			22%					3%							4%		
Stourport-on-Severn		1%			1%												
Tewkesbury																	
Ledbury	1%			2%						1%		19%	2%	12%			
Bromyard					2%				4%								
Towns outside Survey Area	20%	14%	50%	49%	11%	5%	3%	9%	70%	31%	16%	74%	47%	87%	9%	44%	47%
Cheltenham				2%	2%	1%	1%		1%	8%	2%	2%	30%	81%	1%	33%	27%
Hereford	4%			28%					53%	16%	1%	57%					
Redditch			25%												1%	2%	3%
Birmingham		2%	9%	3%	4%		1%	4%	8%	3%	2%				2%		
Bristol					2%						3%				1%	7%	
Gloucester								1%					1%	3%	1%		1%
Leominster				2%					2%			14%	7%				
Stratford upon Avon																1%	8%
Ludlow				5%													
Other	16%	11%	16%	9%	4%	4%	1%	4%	6%	4%	6%	1%	9%	1%	1%	1%	8%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 4: Market Share of small household goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	8%	9%	6%	10%	63%	72%	94%	81%	23%	30%	29%		24%		47%	38%	7%
Worcester City Centre	5%	2%	4%	10%	13%	27%	29%	28%	18%	22%	10%		16%		27%	7%	7%
Worcester Out-of-Centre	2%	7%	1%		49%	22%	65%	53%	5%	8%	17%		7%		20%	30%	
Blackpole Retail Park, Blackpole Road		5%			20%	6%	23%	20%			3%				13%	2%	
Elgar Retail Park, Blackpole Road	2%	2%	1%		18%	14%	27%	11%	5%	8%	6%		4%		4%	26%	
Hylto Road Retail Park								1%									
Shrub Hill Retail Park, Tallow Hill					11%	2%	2%	14%	20%		8%		4%		3%	3%	
Other Out-of-Centre																	
Local Centres						24%					1%						
WYCHAVON DISTRICT	2%		3%		6%	2%	2%						2%	1%	38%	31%	38%
Evesham Town Centre	2%															4%	26%
Evesham Out-of-Centre					1%											18%	12%
Evesham Retail Park, Worcester Road																3%	5%
Four Pools Retail Park, The Link																2%	
The Valley					1%											5%	2%
Other Out-of-Centre																9%	5%
Droitwich Town Centre					3%		2%								36%		
Droitwich Out-of-Centre					2%	2%									2%	1%	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road					2%	2%									2%	1%	
Other																	
Pershore Town Centre													2%	1%		7%	
Other within Wychavon			3%														
MALVERN HILLS DISTRICT				17%	2%	14%		4%	10%	13%	60%	17%	34%	2%	1%	10%	
Great Malvern Town Centre					1%	1%			10%	4%	37%		4%				
Malvern Out-of-Centre					1%	8%		4%		8%	18%	17%	23%	2%		10%	
Malvern Shopping Park, Roman Way					1%			4%		4%	18%	15%		2%		10%	
B&Q, Spring Lane																	
Other						8%				4%		2%	23%				
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern						4%					3%		7%		1%		
Tenbury Wells Town Centre				17%							1%						
Upton-upon-Severn Town Centre																	
Other within Malvern District										2%							
SOUTH WORCESTERSHIRE SUB-TOTAL	9%	9%	8%	27%	72%	88%	95%	85%	33%	43%	89%	17%	60%	3%	86%	78%	45%
OUTSIDE SOUTH WORCESTERSHIRE	91%	91%	92%	73%	28%	12%	5%	15%	67%	57%	11%	83%	40%	97%	14%	22%	55%
Towns within Survey Area	65%	78%	35%	22%	13%	4%	2%	2%	8%	2%	2%	36%		19%	5%		
Kidderminster	57%	66%	2%	19%	7%	4%	2%	2%							5%		
Bromsgrove			33%														
Stourport-on-Severn	9%	13%			6%												
Tewkesbury																	
Ledbury											2%	36%		19%			
Bromyard				3%				8%	2%	2%							
Towns outside Survey Area	26%	13%	57%	51%	15%	8%	3%	13%	59%	56%	9%	48%	40%	78%	9%	22%	55%
Cheltenham					1%	5%		1%			3%	6%	28%	74%		13%	16%
Hereford	2%			31%					39%	21%		31%					
Redditch			13%												3%	1%	7%
Birmingham			7%		5%				10%	4%	2%					2%	8%
Bristol					2%	1%				2%	2%						1%
Gloucester								1%				10%	11%	3%	2%		2%
Leominster				5%					4%				2%	1%			
Stratford upon Avon																2%	11%
Ludlow	5%																
Other	18%	13%	37%	15%	7%	2%	3%	10%	6%	29%	3%				4%	5%	10%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 5: Market Share of clocks, jewellery, and watches goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	22%	6%	1%	4%	66%	78%	80%	83%	22%	29%	41%		18%		48%	45%	
Worcester City Centre	22%	6%	1%	4%	64%	70%	70%	75%	15%	29%	41%		18%		41%	45%	
Worcester Out-of-Centre					2%	3%	10%	8%	7%						7%		
Blackpole Retail Park, Blackpole Road					2%	1%	3%	3%							7%		
Elgar Retail Park, Blackpole Road						2%	7%		7%								
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill								5%									
Other Out-of-Centre																	
Local Centres						6%											
WYCHAVON DISTRICT	2%						4%	3%							22%	16%	56%
Evesham Town Centre								3%								5%	41%
Evesham Out-of-Centre																2%	14%
Evesham Retail Park, Worcester Road																2%	14%
Four Pools Retail Park, The Link																	
The Valley																	
Other Out-of-Centre																	
Droitwich Town Centre							2%								19%		
Droitwich Out-of-Centre	2%														3%		
Droitwich Spa Retail Park, Kidderminster Road	2%														2%		
Roman Way Retail Park, Kidderminster Road															2%		
Other																	
Pershore Town Centre																9%	
Other within Wychavon							2%										
MALVERN HILLS DISTRICT	2%			45%	5%	14%		2%	5%	36%	55%	13%	27%				
Great Malvern Town Centre					4%	7%			4%	23%	43%	4%	4%				
Malvern Out-of-Centre						7%			2%	4%	7%	7%	6%				
Malvern Shopping Park, Roman Way						7%			2%	4%	7%	7%	2%				
B&Q, Spring Lane																	
Other													4%				
Barnards Green District Centre, Malvern											4%						
Malvern Link District Centre, Malvern								2%		8%		2%	13%				
Tenbury Wells Town Centre	2%			45%	2%												
Upton-upon-Severn Town Centre													4%				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	26%	6%	1%	49%	71%	92%	84%	88%	27%	65%	96%	13%	45%		71%	61%	56%
OUTSIDE SOUTH WORCESTERSHIRE	74%	94%	99%	51%	29%	8%	16%	12%	73%	35%	4%	87%	55%	100%	29%	39%	44%
Towns within Survey Area	52%	67%	14%	15%	15%				14%	12%		39%	4%	27%	6%		
Kidderminster	48%	48%	1%	15%	12%										5%		
Bromsgrove		2%	12%		2%												
Stourport-on-Severn	3%	17%															
Tewkesbury													2%	27%	2%		
Ledbury												39%	2%				
Bromyard					2%				14%	8% 4%							
Towns outside Survey Area	23%	26%	85%	36%	14%	8%	16%	12%	58%	23%	4%	48%	51%	73%	23%	39%	44%
Cheltenham				2%	2%	2%		1%			2%	2%	30%	51%		12%	35%
Hereford				9%					51%			29%					
Redditch			16%					2%						2%	11%		1%
Birmingham	6%	12%	50%		4%	1%	9%	2%	4%	8%		2%		2%	4%	14%	
Bristol						1%								2%			
Gloucester																	
Leominster				2%					4%	2%						2%	
Stratford upon Avon			6%			1%											1%
Ludlow	7%			6%	2%												
Other	10%	15%	13%	16%	7%	2%	7%	7%		14%	2%	15%	17%	16%	8%	11%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices

Table 6: Market Share of toys, games, bicycles and other recreational/sports goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	4%	1%	8%	11%	62%	80%	92%	77%	27%	56%	36%	9%	22%		33%	40%	3%
Worcester City Centre	4%	1%	8%	11%	54%	71%	86%	60%	23%	54%	29%	9%	22%		29%	24%	3%
Worcester Out-of-Centre					7%	2%	6%	13%	3%						5%	16%	
Blackpole Retail Park, Blackpole Road															5%	14%	
Elgar Retail Park, Blackpole Road							6%	1%								2%	
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill					7%	2%		11%	3%								
Other Out-of-Centre																	
Local Centres						7%		4%		3%	7%						
WYCHAVON DISTRICT							3%				4%				31%	30%	60%
Evesham Town Centre																2%	50%
Evesham Out-of-Centre											4%					12%	10%
Evesham Retail Park, Worcester Road																10%	3%
Four Pools Retail Park, The Link											4%						2%
The Valley																2%	5%
Other Out-of-Centre																	
Droitwich Town Centre															31%		
Droitwich Out-of-Centre																2%	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road																2%	
Other																	
Pershore Town Centre							3%									15%	
Other within Wychavon																	
MALVERN HILLS DISTRICT				6%		2%			2%	5%	34%	17%	19%				
Great Malvern Town Centre										3%	16%						
Malvern Out-of-Centre						2%			2%		11%	15%	11%				
Malvern Shopping Park, Roman Way						2%			2%		11%	12%	11%				
B&Q, Spring Lane												3%					
Other																	
Barnards Green District Centre, Malvern										3%	7%						
Malvern Link District Centre, Malvern												3%	6%				
Tenbury Wells Town Centre				6%													
Upton-upon-Severn Town Centre													2%				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	4%	1%	8%	17%	62%	81%	94%	77%	29%	61%	74%	27%	41%		65%	71%	63%
OUTSIDE SOUTH WORCESTERSHIRE	96%	99%	92%	83%	38%	19%	6%	23%	71%	39%	26%	73%	59%	100%	35%	29%	37%
Towns within Survey Area	86%	97%	22%	55%	34%		6%	6%	3%	10%	2%	32%	21%	16%	17%		
Kidderminster	86%	88%	5%	55%	34%		6%	6%	3%	10%	2%	32%	21%	16%	15%		
Bromsgrove			17%							3%					3%		
Stourport-on-Severn		9%															
Tewkesbury																	
Ledbury									3%	8%		32%	17%	16%			
Bromyard													3%				
Towns outside Survey Area	10%	2%	70%	28%	4%	19%		18%	68%	28%	24%	41%	38%	84%	18%	29%	37%
Cheltenham						4%		10%		3%	20%	3%	24%	81%	3%	11%	24%
Hereford				16%		2%			37%	8%		34%				2%	
Redditch			14%					1%							11%		2%
Birmingham			47%		4%				2%	3%	2%				3%	14%	
Bristol						2%											
Gloucester								1%	6%		2%	5%	2%	3%			
Leominster																	
Stratford upon Avon																2%	6%
Ludlow	5%								2%								
Other	5%	2%	9%	11%		12%		5%	20%	15%			12%		2%		5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
 Market share figures derived from NEMS Household Survey
 Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
 Figures may not add due to rounding



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 7: Market Share of chemist goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	8%		2%	3%	45%	85%	97%	87%	10%	15%	3%		4%		7%	9%	
Worcester City Centre	8%		2%	3%	40%	32%	64%	49%	5%	14%	1%		3%		7%	6%	
Worcester Out-of-Centre					1%	8%	24%	27%	6%		2%		1%			3%	
Blackpole Retail Park, Blackpole Road							1%		6%								
Elgar Retail Park, Blackpole Road																	
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill					1%	7%	22%	27%			2%		1%			3%	
Other Out-of-Centre																	
Local Centres					5%	44%	9%	10%		1%							
WYCHAVON DISTRICT		1%		1%	9%	1%	1%	3%					2%	3%	85%	81%	99%
Evesham Town Centre														1%		8%	66%
Evesham Out-of-Centre														1%		12%	28%
Evesham Retail Park, Worcester Road														1%		11%	20%
Four Pools Retail Park, The Link																	
The Valley																1%	8%
Other Out-of-Centre																	
Droitwich Town Centre				1%	3%	1%		1%							83%		
Droitwich Out-of-Centre					2%		1%								2%		
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road					2%		1%								2%		
Other																	
Pershore Town Centre					3%			2%					2%	1%		61%	
Other within Wychavon		1%			1%												5%
MALVERN HILLS DISTRICT				80%	11%	14%	1%	8%	3%	70%	94%	4%	57%	1%			
Great Malvern Town Centre					1%	4%				20%	48%		12%				
Malvern Out-of-Centre					7%	7%		4%	2%	34%	31%	3%	6%	1%			
Malvern Shopping Park, Roman Way					7%	7%		4%	2%	31%	28%	2%	4%	1%			
B&Q, Spring Lane																	
Other						1%				3%	4%	2%	2%				
Barnards Green District Centre, Malvern										1%	4%		4%				
Malvern Link District Centre, Malvern						3%	1%	3%		15%	10%	1%	7%				
Tenbury Wells Town Centre				80%	3%				1%		1%						
Upton-upon-Severn Town Centre													28%				
Other within Malvern District					1%			1%									
SOUTH WORCESTERSHIRE SUB-TOTAL	8%	1%	2%	84%	65%	100%	99%	98%	13%	85%	98%	4%	62%	4%	91%	90%	99%
OUTSIDE SOUTH WORCESTERSHIRE	92%	99%	98%	16%	35%		1%	2%	87%	15%	2%	96%	38%	96%	9%	10%	1%
Towns within Survey Area	36%	86%	85%	9%	33%				65%	10%	1%	91%	25%	64%	8%	4%	
Kidderminster	30%	59%		8%	6%										1%		
Bromsgrove		1%	85%	1%	2%										6%		
Stourport-on-Severn	6%	26%			23%										1%		
Tewkesbury																	
Ledbury											1%		24%	64%		4%	
Bromyard					3%				65%	3%		91%	2%				
Towns outside Survey Area	56%	13%	12%	7%	2%		1%	2%	22%	5%	2%	5%	12%	33%	1%	6%	1%
Cheltenham													10%	26%		3%	1%
Hereford				1%					17%	1%		4%			1%	1%	
Redditch			4%													2%	
Birmingham			5%														
Bristol																	
Gloucester								1%					2%	2%			
Leominster				5%					5%	2%							
Stratford upon Avon																	1%
Ludlow	14%			1%													
Other	42%	13%	4%		2%		1%	2%		3%	2%	1%		5%			
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
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Table 8: Market Share of large household electrical items, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY		1%	3%	3%	56%	89%	99%	73%	14%	37%	49%	1%	32%	2%	54%	43%	13%
Worcester City Centre		1%			6%	17%	11%	19%		10%	14%		15%		6%		7%
Worcester Out-of-Centre			3%	3%	48%	67%	85%	54%	14%	28%	36%	1%	16%	2%	48%	43%	6%
Blackpole Retail Park, Blackpole Road			3%	3%	41%	63%	66%	47%	14%	23%	34%	1%	13%	2%	48%	43%	6%
Elgar Retail Park, Blackpole Road					2%	3%	16%	6%		3%	2%		1%				
Hylto Road Retail Park					6%	1%							1%				
Shrub Hill Retail Park, Tallow Hill							3%			2%							
Other Out-of-Centre																	
Local Centres					2%	6%	3%										
WYCHAVON DISTRICT		1%					1%	12%						3%	28%	50%	77%
Evesham Town Centre														1%		18%	45%
Evesham Out-of-Centre								1%						1%		29%	33%
Evesham Retail Park, Worcester Road								1%						1%		12%	6%
Four Pools Retail Park, The Link																17%	27%
The Valley																	
Other Out-of-Centre																	
Droitwich Town Centre							1%	10%							28%	1%	
Droitwich Out-of-Centre		1%															
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road																	
Other		1%															
Pershore Town Centre																	
Other within Wychavon								1%								1%	
MALVERN HILLS DISTRICT	15%			61%	13%	6%		1%	8%	38%	36%	2%	24%				
Great Malvern Town Centre										12%	11%		3%				
Malvern Out-of-Centre						3%		1%		16%	14%	2%	6%				
Malvern Shopping Park, Roman Way						3%				16%	13%	1%	6%				
B&Q, Spring Lane								1%				1%					
Other											1%	1%					
Barnards Green District Centre, Malvern					2%	3%				10%	10%		14%				
Malvern Link District Centre, Malvern																	
Tenbury Wells Town Centre	15%			61%	11%				8%								
Upton-upon-Severn Town Centre																	
Other within Malvern District													1%				
SOUTH WORCESTERSHIRE SUB-TOTAL	15%	3%	3%	64%	69%	95%	100%	87%	22%	75%	85%	3%	56%	4%	82%	93%	91%
OUTSIDE SOUTH WORCESTERSHIRE	85%	97%	97%	36%	31%	5%		13%	78%	25%	15%	97%	44%	96%	18%	7%	9%
Towns within Survey Area	67%	81%	43%	16%	21%			2%	14%			47%	1%	11%	8%		
Kidderminster	63%	71%	16%	16%	13%				3%			4%		10%	2%		
Bromsgrove			27%		3%			2%							6%		
Stourport-on-Severn	4%	11%			5%												
Tewkesbury																	
Ledbury									3%			43%	1%	1%			
Bromyard									8%								
Towns outside Survey Area	18%	16%	54%	20%	11%	5%		11%	64%	25%	15%	50%	42%	85%	10%	7%	9%
Cheltenham					2%			8%		2%	6%	6%	34%	66%			9%
Hereford				14%					52%	15%	3%	38%					
Redditch			26%												2%	3%	
Birmingham	1%	1%	7%		6%			8%			2%					3%	
Bristol																	
Gloucester											3%	3%		2%			
Leominster								3%				2%	9%	17%			
Stratford upon Avon																	
Ludlow	9%			3%						2%							
Other	7%	15%	21%	4%	3%	5%		3%	2%	7%	1%				8%	2%	1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
 Market share figures derived from NEMS Household Survey
 Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
 Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 9: Market Share of small electrical goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY		2%	1%		59%	93%	93%	94%	11%	31%	32%		12%		33%	52%	
Worcester City Centre		1%	1%		26%	32%	11%	36%	1%	3%	6%		4%		6%	16%	
Worcester Out-of-Centre		1%			30%	49%	82%	54%	10%	23%	27%		8%		27%	36%	
Blackpole Retail Park, Blackpole Road		1%			26%	44%	53%	32%	8%	17%	25%		7%		27%	35%	
Elgar Retail Park, Blackpole Road					2%	1%	22%	4%		2%							
Hylto Road Retail Park						3%											
Shrub Hill Retail Park, Tallow Hill					3%	1%	8%	18%	2%	5%	1%		1%			1%	
Other Out-of-Centre																	
Local Centres					3%	12%		4%		5%			1%				
WYCHAVON DISTRICT				3%	3%		1%	2%							57%	44%	88%
Evesham Town Centre																10%	45%
Evesham Out-of-Centre																28%	43%
Evesham Retail Park, Worcester Road																12%	20%
Four Pools Retail Park, The Link																15%	17%
The Valley																1%	6%
Other Out-of-Centre																	
Droitwich Town Centre					1%		1%	1%							55%		
Droitwich Out-of-Centre				3%	1%										3%	1%	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road				3%													
Other					1%										3%	1%	
Pershore Town Centre																5%	
Other within Wychavon								1%									
MALVERN HILLS DISTRICT	8%			56%	4%	6%	3%		6%	43%	56%	6%	41%			1%	
Great Malvern Town Centre					1%					5%	21%		4%				
Malvern Out-of-Centre						4%			4%	24%	29%	6%	23%			1%	
Malvern Shopping Park, Roman Way						3%			4%	19%	27%	5%	21%			1%	
B&Q, Spring Lane						1%											
Other										5%	1%	1%	2%				
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern						2%	3%			14%	6%		12%				
Tenbury Wells Town Centre	8%			56%	3%				2%								
Upton-upon-Severn Town Centre													2%				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	8%	2%	1%	59%	66%	99%	97%	97%	17%	75%	88%	6%	54%		90%	97%	88%
OUTSIDE SOUTH WORCESTERSHIRE	92%	98%	99%	41%	34%	1%	3%	3%	83%	25%	12%	94%	46%	100%	10%	3%	12%
Towns within Survey Area	81%	87%	65%	28%	34%				10%	8%		59%	17%	19%	1%		
Kidderminster	79%	79%	13%	28%	22%												
Bromsgrove	1%		52%		3%										1%		
Stourport-on-Severn		8%			8%												
Tewkesbury																	
Ledbury																	
Bromyard					1%				10%	5%		59%	9%	19%			
									3%	3%		8%					
Towns outside Survey Area	12%	11%	33%	13%		1%	3%	3%	73%	17%	12%	35%	29%	81%	8%	3%	12%
Cheltenham				2%							3%	2%	28%	76%			3%
Hereford				9%					58%	12%							
Redditch			4%												4%		6%
Birmingham			18%				1%		9%		2%				1%	2%	
Bristol											1%						
Gloucester											2%						
Leominster				2%					6%	2%	2%	2%	1%	6%			
Stratford upon Avon												2%					2%
Ludlow	6%																
Other	6%	11%	11%			1%	1%	3%		3%	2%				3%	1%	1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 10: Market Share of furniture, carpets and floor coverings, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	5%	2%	7%	2%	29%	64%	84%	65%	3%	25%	22%	9%	23%		17%	11%	13%
Worcester City Centre	3%		1%	2%	9%	25%	21%	22%		8%	15%	5%	5%		8%	3%	
Worcester Out-of-Centre	3%	2%	6%		20%	27%	63%	43%	3%	17%	7%	4%	18%		8%	8%	13%
Blackpole Retail Park, Blackpole Road	3%	2%	6%		18%	24%	46%	33%	1%	14%	7%	3%	16%		8%	6%	13%
Elgar Retail Park, Blackpole Road					1%	3%	15%	10%	2%	3%			1%			2%	
Hylto Road Retail Park							1%					2%					
Shrub Hill Retail Park, Tallow Hill																	
Other Out-of-Centre																	
Local Centres						13%											
WYCHAVON DISTRICT	2%	4%	8%	4%	8%	8%	2%	5%						1%	63%	59%	45%
Evesham Town Centre																3%	23%
Evesham Out-of-Centre																16%	22%
Evesham Retail Park, Worcester Road																	3%
Four Pools Retail Park, The Link																6%	18%
The Valley																10%	1%
Other Out-of-Centre																	
Droitwich Town Centre			1%			1%		1%								57%	
Droitwich Out-of-Centre	2%	4%	7%	4%	8%	7%	2%	1%						1%	6%	9%	
Droitwich Spa Retail Park, Kidderminster Road			1%													2%	
Roman Way Retail Park, Kidderminster Road	2%	4%	6%	4%	8%	7%	2%	1%						1%	6%	7%	
Other																	
Pershore Town Centre								3%								28%	
Other within Wychavon																3%	
MALVERN HILLS DISTRICT				25%	6%	14%	1%	5%	3%	38%	53%	1%	14%				
Great Malvern Town Centre					3%	3%				11%	32%	1%	3%				
Malvern Out-of-Centre						6%			1%	9%	1%						
Malvern Shopping Park, Roman Way						6%			1%	9%	1%						
B&Q, Spring Lane																	
Other																	
Barnards Green District Centre, Malvern										2%							
Malvern Link District Centre, Malvern						5%	1%	4%	2%	14%	19%		7%				
Tenbury Wells Town Centre				25%	3%			1%									
Upton-upon-Severn Town Centre													4%				
Other within Malvern District										2%							
SOUTH WORCESTERSHIRE SUB-TOTAL	7%	6%	15%	31%	43%	86%	87%	75%	6%	62%	75%	10%	36%	1%	79%	70%	59%
OUTSIDE SOUTH WORCESTERSHIRE	93%	94%	85%	69%	57%	14%	13%	25%	94%	38%	25%	90%	64%	99%	21%	30%	41%
Towns within Survey Area	73%	85%	48%	43%	37%	8%	3%	6%	29%	12%	5%	50%	14%	14%	12%	3%	
Kidderminster	72%	81%	4%	37%	34%	6%	3%	6%	1%	9%			1%		5%	2%	
Bromsgrove			43%			3%									7%		
Stourport-on-Severn		4%															
Tewkesbury																	
Ledbury	1%								2%	2%	5%	50%	6%	14%		2%	
Bromyard				6%	3%				26%	2%			5%				
Towns outside Survey Area	20%	9%	37%	27%	20%	6%	10%	18%	65%	26%	20%	40%	50%	85%	9%	26%	41%
Cheltenham					7%		3%	3%	1%	5%	8%	4%	37%	78%	2%	17%	38%
Hereford				23%	3%				45%	8%	3%	31%				6%	
Redditch			11%														
Birmingham			16%						7%	5%			1%				
Bristol								1%		5%			6%				
Gloucester											1%		4%				
Leominster				2%					7%		5%		4%	1%	2%		
Stratford upon Avon																	2%
Ludlow	13%																
Other	7%	9%	10%	2%	10%	6%	7%	13%	4%	3%	4%	2%	2%		5%	3%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 11: Market Share of DIY (including gardening) goods, by Zone (%)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY			1%	4%	47%	79%	93%	81%	14%	28%	5%		8%		17%	21%	
Worcester City Centre					11%	6%	11%	18%	2%	6%	1%		1%		6%	1%	
Worcester Out-of-Centre			1%	4%	36%	72%	82%	61%	12%	22%	4%		6%		10%	20%	
Blackpole Retail Park, Blackpole Road			1%	1%	6%	6%	27%	12%	3%	3%	3%				3%	2%	
Elgar Retail Park, Blackpole Road					9%	2%	24%	15%	3%	5%			3%		3%		
Hylto Road Retail Park				1%	20%	50%	18%	11%	4%	6%			1%		1%	1%	
Shrub Hill Retail Park, Tallow Hill					11%	11%	4%	6%								2%	
Other Out-of-Centre				1%	2%	3%	9%	18%	1%	8%	1%		3%		3%	15%	
Local Centres						1%		2%									
WYCHAVON DISTRICT				1%	2%	2%	1%	2%			3%			4%	72%	76%	97%
Evesham Town Centre														1%		3%	28%
Evesham Out-of-Centre						1%					2%			3%		60%	58%
Evesham Retail Park, Worcester Road																4%	8%
Four Pools Retail Park, The Link											2%					52%	41%
The Valley						1%								2%		3%	
Other Out-of-Centre														1%		1%	9%
Droitwich Town Centre					2%			1%							27%	1%	
Droitwich Out-of-Centre				1%	1%	1%	1%				1%				44%		
Droitwich Spa Retail Park, Kidderminster Road															15%		
Roman Way Retail Park, Kidderminster Road					1%	1%					1%				22%		
Other				1%		1%	1%								8%		
Pershore Town Centre								1%								12%	
Other within Wychavon																	11%
MALVERN HILLS DISTRICT	2%			38%	4%	18%	4%	6%	4%	48%	87%	1%	49%	1%			
Great Malvern Town Centre						2%				3%	11%						
Malvern Out-of-Centre					3%	11%		6%	4%	37%	59%	1%	16%				
Malvern Shopping Park, Roman Way						2%		1%		4%	7%						
B&Q, Spring Lane					3%	9%		5%	4%	26%	40%	1%	12%				
Other						1%				7%	13%		5%				
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern						5%				9%	16%		20%	1%			
Tenbury Wells Town Centre	1%			32%													
Upton-upon-Severn Town Centre							4%						13%				
Other within Malvern District	1%			6%	1%						1%						
SOUTH WORCESTERSHIRE SUB-TOTAL	2%		1%	44%	53%	98%	98%	89%	17%	76%	94%	1%	57%	6%	88%	97%	97%
OUTSIDE SOUTH WORCESTERSHIRE	98%	100%	99%	57%	47%	2%	2%	11%	83%	24%	6%	99%	43%	94%	12%	3%	3%
Towns within Survey Area	70%	100%	79%	22%	39%	2%	2%	10%	14%	15%	6%	93%	18%	31%	9%	1%	1%
Kidderminster	64%	87%	3%	22%	25%	2%	2%	3%	1%		3%				2%		1%
Bromsgrove			76%					6%							7%		
Stourport-on-Severn	5%	13%			14%								1%				
Tewkesbury											1%		12%	31%		1%	
Ledbury	1%							1%		11%	2%	93%	5%				
Bromyard									13%	3%							
Towns outside Survey Area	28%		20%	34%	8%			1%	69%	9%		6%	25%	63%	2%	2%	2%
Cheltenham													16%	50%			
Hereford				4%	1%				33%	9%		3%					
Redditch			13%					1%							2%	2%	
Birmingham			1%														
Bristol																	
Gloucester													9%	6%			
Leominster	7%			27%				33%									
Stratford upon Avon																	1%
Ludlow	16%			3%	6%												
Other	6%		6%	1%	1%			3%				3%	8%				1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:
Market share figures derived from NEMS Household Survey
Excludes responses Special Forms of Trading, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 12: Turnover of clothing and footwear goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	15	15	16	17
WORCESTER CITY	1.1	9.7	1.5	1.3	5.2	24.8	45.1	22.5	1.7	3.8	9.9	0.5	1.3	0.2	20.7	14.8	7.0
Worcester City Centre	1.1	9.7	1.5	1.3	5.2	23.2	45.1	21.3	1.6	3.8	9.9	0.5	1.2	0.2	20.7	14.8	7.0
Worcester Out-of-Centre						0.5		0.9									
Blackpole Retail Park, Blackpole Road																	
Elgar Retail Park, Blackpole Road						0.5											
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill								0.9									
Other Out-of-Centre																	
Local Centres					0.1	1.1		0.3	0.1				0.1				
WYCHAVON DISTRICT	0.1		1.3				0.5	0.8		0.1	0.4		0.2	0.2	8.7	5.5	13.9
Evesham Town Centre			0.8													0.8	10.9
Evesham Out-of-Centre			0.5								0.4					1.9	2.3
Evesham Retail Park, Worcester Road											0.4					0.9	1.3
Four Pools Retail Park, The Link																0.5	0.7
The Valley			0.5													0.5	0.3
Other Out-of-Centre																	
Droitwich Town Centre	0.1						0.5	0.5							8.4		
Droitwich Out-of-Centre															0.3		
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road															0.3		
Other																	
Pershore Town Centre													0.2	0.2		2.8	0.3
Other within Wychavon								0.3		0.1							0.3
MALVERN HILLS DISTRICT		1.7		0.5	0.3	7.5	1.8	5.4	0.7	3.8	20.5	5.2	3.3		0.7	0.8	
Great Malvern Town Centre						0.5			0.1	1.1	5.3	1.7	1.0				
Malvern Out-of-Centre		1.7			0.2	5.6	0.9	5.2	0.6	2.3	13.8	3.3	1.5		0.7	0.8	
Malvern Shopping Park, Roman Way		1.7			0.2	5.6	0.9	5.2	0.6	2.3	13.8	3.3	1.5		0.7	0.8	
B&Q, Spring Lane																	
Other																	
Barnards Green District Centre, Malvern												0.1					
Malvern Link District Centre, Malvern					0.1	1.3	1.0	0.3		0.4	1.4	0.1	0.7				
Tenbury Wells Town Centre				0.5													
Upton-upon-Severn Town Centre													0.1				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	1.2	11.4	2.8	1.8	5.5	32.3	47.5	28.7	2.4	7.7	30.8	5.6	4.8	0.4	30.1	21.1	20.9
OUTSIDE SOUTH WORCESTERSHIRE	7.6	82.7	45.6	4.8	2.3	1.1	4.4	3.1	3.6	2.3	5.7	8.1	5.8	21.8	4.2	8.1	28.7
Towns within Survey Area	5.4	58.8	12.9	1.4	1.1				0.2	0.2		1.0	0.5	5.4		0.3	
Kidderminster	5.4	49.5	1.2	1.4	0.4					0.1			0.1				
Bromsgrove			11.6														
Stourport-on-Severn	0.1	9.4			0.6												
Tewkesbury													0.2	5.4			
Ledbury									0.1			1.0	0.2			0.3	
Bromyard									0.2	0.1							
Towns outside Survey Area	2.1	23.8	32.8	3.4	1.2	1.1	4.4	3.1	3.3	2.1	5.7	7.1	5.2	16.4	4.2	7.8	28.7
Cheltenham					0.3	0.3		1.9	0.2	0.4	4.7	0.8	2.5	13.9		6.5	17.5
Hereford				1.6					2.3	1.3		5.5					
Redditch			11.3													0.8	1.7
Birmingham	0.1	2.1	13.0		0.3		1.6		0.1		0.3	0.1	0.1	0.2	1.8		
Bristol					0.1									0.4	0.3		0.4
Gloucester					0.1			0.3	0.1	0.3		0.1	1.4	0.4	0.4	0.5	1.6
Leominster				0.4					0.1								
Stratford upon Avon						0.3											7.1
Ludlow	0.4			0.3	0.1				0.2								
Other	1.6	21.8	8.5	1.1	0.6	0.3	2.8	0.9	0.3	0.1	0.7	0.5	1.2	1.5	1.0		0.3
Total	8.8	94.1	48.5	6.6	7.8	33.4	51.9	31.8	6.0	10.0	36.4	13.7	10.6	22.2	34.3	29.2	49.5

Notes:
Zonal market shares (Table 1) applied to available relevant expenditure per zone
Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 13: Turnvoer of books, CD's, DVD's, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.2	0.9	0.4	0.2	1.5	5.8	9.1	5.7	0.3	1.5	2.8	0.2	0.5		2.9	3.2	1.3
Worcester City Centre	0.2	0.9	0.4	0.2	1.4	4.9	8.1	4.3	0.3	1.3	2.4	0.2	0.5		2.9	3.1	1.3
Worcester Out-of-Centre						0.2	1.0	1.4			0.4		0.0			0.1	
Blackpole Retail Park, Blackpole Road																	
Elgar Retail Park, Blackpole Road																	
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill						0.2	1.0	1.4			0.4		0.0			0.1	
Other Out-of-Centre																	
Local Centres					0.1	0.7				0.1							
WYCHAVON DISTRICT				0.0	0.0		0.2								3.5	2.9	4.2
Evesham Town Centre																0.8	3.1
Evesham Out-of-Centre															0.1	0.5	1.1
Evesham Retail Park, Worcester Road																	0.1
Four Pools Retail Park, The Link																	
The Valley															0.1		0.5
Other Out-of-Centre																0.5	0.6
Droitwich Town Centre				0.0	0.0		0.2								3.4		
Droitwich Out-of-Centre																	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road																	
Other																	
Pershore Town Centre																1.6	
Other within Wychavon																	
MALVERN HILLS DISTRICT				0.5		0.4			0.0	0.4	3.9	0.0	0.7			0.1	
Great Malvern Town Centre				0.0		0.2				0.3	3.4	0.0	0.2			0.1	
Malvern Out-of-Centre						0.1			0.0	0.1	0.1		0.2				
Malvern Shopping Park, Roman Way						0.1				0.1			0.1				
B&Q, Spring Lane									0.0	0.1	0.1		0.0				
Other																	
Barnards Green District Centre, Malvern										0.1							
Malvern Link District Centre, Malvern											0.3		0.0				
Tenbury Wells Town Centre				0.5							0.1						
Upton-upon-Severn Town Centre													0.2				
Other within Malvern District						0.1											
SOUTH WORCESTERSHIRE SUB-TOTAL	0.2	0.9	0.4	0.8	1.5	6.2	9.3	5.7	0.3	1.9	6.7	0.2	1.2		6.4	6.2	5.6
OUTSIDE SOUTH WORCESTERSHIRE	1.8	17.0	8.8	0.6	0.4	0.2		0.2	0.9	0.4	0.3	2.6	1.5	4.8	0.7	0.3	4.3
Towns within Survey Area	0.7	11.9	6.3	0.1	0.2				0.1			1.8	0.6	2.5	0.3		0.1
Kidderminster	0.5	7.5		0.1	0.2										0.3		
Bromsgrove			6.3														
Stourport-on-Severn	0.2	4.5															
Tewkesbury													0.5				0.1
Ledbury												1.8	0.1				
Bromyard									0.1					2.5			
Towns outside Survey Area	1.1	5.0	2.5	0.5	0.2	0.2		0.2	0.8	0.4	0.3	0.8	0.9	2.3	0.4	0.3	4.1
Cheltenham						0.1					0.1		0.3	2.0		0.2	2.1
Hereford				0.2					0.8	0.3		0.7	0.3				
Redditch			1.2														0.4
Birmingham	0.2	0.9	0.4								0.2		0.0		0.1		0.2
Bristol														0.1			
Gloucester										0.1							
Leominster				0.2					0.0								
Stratford upon Avon																	1.3
Ludlow	0.4			0.0					0.0								
Other	0.5	4.1	0.9	0.1	0.2	0.1		0.2	0.0	0.1		0.0	0.3	0.2	0.3	0.1	0.2
Total	1.9	17.9	9.2	1.4	1.9	6.4	9.3	5.8	1.2	2.3	7.1	2.8	2.7	4.8	7.1	6.6	9.8

Notes:
 Zonal market shares (Table 2) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 14: Turnover of furnishings and household textile goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.1	1.2	1.1	0.1	0.9	4.6	7.7	4.3	0.3	1.0	2.1	0.0	0.3		4.0	1.9	1.3
Worcester City Centre	0.1	0.5	0.2	0.0	0.2	1.5	1.2	1.4	0.1	0.7	0.6		0.1		1.5	0.6	0.7
Worcester Out-of-Centre	0.0	0.7	0.9	0.0	0.7	2.8	6.5	2.8	0.2	0.3	1.5	0.0	0.2		2.5	1.3	0.7
Blackpole Retail Park, Blackpole Road	0.0	0.2	0.5	0.0	0.4	1.0	2.2	1.4	0.1	0.2	0.7		0.1		1.2	0.2	0.6
Elgar Retail Park, Blackpole Road		0.5	0.4		0.2	1.7	4.2	1.0	0.1	0.1	0.9	0.0	0.1		1.4	1.1	0.1
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill						0.1	0.1	0.4									
Other Out-of-Centre																	
Local Centres						0.3				0.0							
WYCHAVON DISTRICT	0.1		0.9		0.1	0.1	0.1							0.0	1.0	1.1	3.0
Evesham Town Centre																0.2	2.1
Evesham Out-of-Centre					0.1											0.7	0.9
Evesham Retail Park, Worcester Road																0.5	0.6
Four Pools Retail Park, The Link																0.2	0.3
The Valley					0.1												0.1
Other Out-of-Centre																	
Droitwich Town Centre	0.0		0.1			0.1	0.1								0.8		
Droitwich Out-of-Centre	0.0		0.8												0.3		
Droitwich Spa Retail Park, Kidderminster Road			0.1												0.1		
Roman Way Retail Park, Kidderminster Road	0.0		0.8												0.2		
Other																	
Pershore Town Centre														0.0		0.3	
Other within Wychavon																	
MALVERN HILLS DISTRICT				0.1	0.1	0.3	0.1	0.2	0.0	0.3	3.1	0.1	0.7			0.1	
Great Malvern Town Centre							0.1			0.2	1.2	0.0	0.3			0.1	
Malvern Out-of-Centre						0.2		0.2	0.0	0.1	1.7	0.1	0.2				
Malvern Shopping Park, Roman Way						0.2		0.2	0.0		1.4	0.1	0.2				
B&Q, Spring Lane										0.0							
Other										0.0	0.3						
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern				0.0		0.1				0.1	0.2		0.2				
Tenbury Wells Town Centre				0.0				0.0									
Upton-upon-Severn Town Centre																	
Other within Malvern District				0.0	0.1					0.0							
SOUTH WORCESTERSHIRE SUB-TOTAL	0.2	1.2	2.0	0.1	1.1	4.9	7.9	4.5	0.3	1.3	5.2	0.2	1.0	0.0	5.1	3.0	4.4
OUTSIDE SOUTH WORCESTERSHIRE	1.5	15.0	6.2	1.2	0.4	0.3	0.2	0.6	0.9	0.6	1.0	2.3	1.0	3.5	0.8	2.4	3.9
Towns within Survey Area	1.2	12.8	2.1	0.5	0.3	0.1		0.2	0.1	0.0		0.5	0.0	0.4	0.3		
Kidderminster	1.2	12.6	0.3	0.5	0.2	0.1		0.2							0.1		
Bromsgrove			1.8												0.2		
Stourport-on-Severn		0.2			0.0												
Tewkesbury																	
Ledbury	0.0			0.0						0.0		0.5	0.0	0.4			
Bromyard					0.0				0.1								
Towns outside Survey Area	0.3	2.2	4.1	0.6	0.2	0.3	0.2	0.5	0.8	0.6	1.0	1.9	0.9	3.1	0.5	2.4	3.9
Cheltenham				0.0	0.0	0.1	0.1	0.5	0.0	0.2	0.2	0.1	0.6	2.9	0.1	1.8	2.2
Hereford	0.1			0.4					0.6	0.3	0.1	1.4					
Redditch			2.1												0.1	0.1	0.3
Birmingham		0.4	0.8	0.0	0.1		0.1	0.2	0.1	0.1	0.2				0.1		
Bristol					0.0						0.2				0.1	0.4	
Gloucester								0.0			0.2		0.0	0.1	0.1		0.1
Leominster				0.0					0.0			0.3	0.1	0.1			
Stratford upon Avon																0.1	0.7
Ludlow				0.1													
Other	0.3	1.9	1.3	0.1	0.1	0.2	0.1	0.2	0.1	0.1	0.4	0.0	0.2	0.0	0.1	0.1	0.7
Total	1.7	16.2	8.2	1.3	1.5	5.3	8.1	5.1	1.2	1.9	6.2	2.5	2.0	3.5	5.9	5.4	8.3

Notes:
 Zonal market shares (Table 3) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 15: Turnover of small household goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.2	1.7	0.6	0.1	1.3	4.7	9.6	5.3	0.3	0.7	2.3		0.7		3.6	2.7	0.8
Worcester City Centre	0.1	0.4	0.4	0.1	0.3	1.7	2.9	1.9	0.2	0.6	0.8		0.5		2.1	0.5	0.8
Worcester Out-of-Centre	0.0	1.3	0.1		1.0	1.5	6.6	3.4	0.1	0.2	1.3		0.2		1.5	2.2	
Blackpole Retail Park, Blackpole Road		1.0			0.4	0.4	2.4	1.3			0.2				1.0	0.1	
Elgar Retail Park, Blackpole Road	0.0	0.4	0.1		0.4	0.9	2.7	0.7	0.1	0.2	0.5		0.1		0.3	1.9	
Hylto Road Retail Park								0.1									
Shrub Hill Retail Park, Tallow Hill					0.2	0.1	0.2	1.3			0.6		0.1		0.2	0.2	
Other Out-of-Centre							1.4										
Local Centres						1.5					0.1						
WYCHAVON DISTRICT	0.0		0.3		0.1	0.1	0.2						0.1	0.1	2.9	2.2	4.2
Evesham Town Centre	0.0															0.3	2.9
Evesham Out-of-Centre					0.0											1.3	1.3
Evesham Retail Park, Worcester Road																0.2	0.6
Four Pools Retail Park, The Link																0.1	
The Valley					0.0											0.4	0.2
Other Out-of-Centre																0.6	0.5
Droitwich Town Centre					0.1		0.2								2.7		
Droitwich Out-of-Centre					0.0	0.1									0.1	0.1	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road					0.0	0.1									0.1	0.1	
Other																	
Pershore Town Centre													0.1	0.1		0.5	
Other within Wychavon			0.3														
MALVERN HILLS DISTRICT				0.2	0.0	0.9		0.3	0.1	0.3	4.7	0.5	1.0	0.1	0.1	0.7	
Great Malvern Town Centre					0.0	0.1			0.1	0.1	2.9		0.1				
Malvern Out-of-Centre					0.0	0.5		0.3		0.2	1.4	0.5	0.7	0.1		0.7	
Malvern Shopping Park, Roman Way					0.0			0.3		0.1	1.4	0.5		0.1		0.7	
B&Q, Spring Lane																	
Other						0.5				0.1		0.1	0.7				
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern						0.3					0.2		0.2		0.1		
Tenbury Wells Town Centre				0.2							0.1						
Upton-upon-Severn Town Centre																	
Other within Malvern District										0.0							
SOUTH WORCESTERSHIRE SUB-TOTAL	0.2	1.7	0.8	0.4	1.4	5.8	9.7	5.5	0.4	1.1	7.0	0.5	1.8	0.2	6.6	5.7	4.9
OUTSIDE SOUTH WORCESTERSHIRE	1.9	18.1	9.2	1.1	0.6	0.8	0.5	1.0	0.9	1.5	0.8	2.6	1.2	5.7	1.0	1.6	6.0
Towns within Survey Area	1.4	15.6	3.5	0.3	0.3	0.2	0.2	0.1	0.1	0.0	0.1	1.1		1.1	0.4		
Kidderminster	1.2	13.1	0.2	0.3	0.1	0.2	0.2	0.1							0.4		
Bromsgrove			3.3														
Stourport-on-Severn	0.2	2.5			0.1												
Tewkesbury																	
Ledbury									0.1	0.0	0.1	1.1		1.1			
Bromyard				0.0													
Towns outside Survey Area	0.5	2.6	5.7	0.8	0.3	0.5	0.3	0.8	0.8	1.4	0.7	1.5	1.2	4.6	0.7	1.6	6.0
Cheltenham					0.0	0.3		0.1			0.2	0.2	0.8	4.3		0.9	1.7
Hereford	0.0			0.5					0.5	0.5		1.0					
Redditch			1.4												0.2	0.1	0.8
Birmingham			0.7		0.1				0.1	0.1	0.1					0.1	0.9
Bristol					0.0	0.1				0.1	0.1						0.1
Gloucester								0.1				0.3	0.3	0.1	0.1		0.2
Leominster				0.1					0.1								
Stratford upon Avon																0.1	1.2
Ludlow	0.1																
Other	0.4	2.6	3.7	0.2	0.1	0.1	0.3	0.7	0.1	0.7	0.2				0.3	0.3	1.1
Total	2.1	19.9	10.0	1.5	2.0	6.5	10.2	6.5	1.3	2.5	7.8	3.2	3.0	5.9	7.6	7.2	10.9

Notes:
 Zonal market shares (Table 4) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 16: Turnover of clocks, jewellery, and watches goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.3	0.9	0.1	0.0	0.8	4.1	6.5	4.3	0.2	0.5	2.3		0.4		2.6	2.3	
Worcester City Centre	0.3	0.9	0.1	0.0	0.8	3.6	5.6	3.9	0.1	0.5	2.3		0.4		2.2	2.3	
Worcester Out-of-Centre					0.0	0.2	0.8	0.4	0.1						0.4		
Blackpole Retail Park, Blackpole Road					0.0	0.1	0.3	0.2							0.4		
Elgar Retail Park, Blackpole Road						0.1	0.5		0.1								
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill								0.3									
Other Out-of-Centre																	
Local Centres						0.3											
WYCHAVON DISTRICT	0.0						0.3	0.2							1.2	0.8	4.4
Evesham Town Centre								0.2								0.3	3.3
Evesham Out-of-Centre																0.1	1.1
Evesham Retail Park, Worcester Road																0.1	1.1
Four Pools Retail Park, The Link																	
The Valley																	
Other Out-of-Centre																	
Droitwich Town Centre							0.2								1.0		
Droitwich Out-of-Centre	0.0														0.2		
Droitwich Spa Retail Park, Kidderminster Road	0.0														0.1		
Roman Way Retail Park, Kidderminster Road															0.1		
Other																	
Pershore Town Centre																0.5	
Other within Wychavon							0.2										
MALVERN HILLS DISTRICT	0.0			0.5	0.1	0.7		0.1	0.0	0.6	3.1	0.3	0.6				
Great Malvern Town Centre					0.0	0.4			0.0	0.4	2.4	0.1	0.1				
Malvern Out-of-Centre						0.4			0.0	0.1	0.4	0.1	0.1				
Malvern Shopping Park, Roman Way						0.4			0.0	0.1	0.4	0.1	0.0				
B&Q, Spring Lane													0.1				
Other																	
Barnards Green District Centre, Malvern											0.2						
Malvern Link District Centre, Malvern								0.1		0.1		0.0	0.3				
Tenbury Wells Town Centre	0.0			0.5	0.0												
Upton-upon-Severn Town Centre													0.1				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	0.4	0.9	0.1	0.5	0.9	4.8	6.8	4.6	0.3	1.1	5.3	0.3	0.9		3.8	3.2	4.4
OUTSIDE SOUTH WORCESTERSHIRE	1.1	13.2	7.7	0.6	0.4	0.4	1.3	0.6	0.7	0.6	0.2	1.9	1.1	4.4	1.6	2.0	3.5
Towns within Survey Area	0.8	9.5	1.1	0.2	0.2				0.1	0.2		0.9	0.1	1.2	0.3		
Kidderminster	0.7	6.8	0.1	0.2	0.2										0.3		
Bromsgrove		0.3	0.9		0.0												
Stourport-on-Severn	0.1	2.4															
Tewkesbury													0.0	1.2	0.1		
Ledbury										0.1		0.9	0.0				
Bromyard					0.0				0.1	0.1							
Towns outside Survey Area	0.3	3.7	6.6	0.4	0.2	0.4	1.3	0.6	0.5	0.4	0.2	1.1	1.0	3.2	1.2	2.0	3.5
Cheltenham				0.0	0.0	0.1		0.1			0.1	0.0	0.6	2.3	0.6	0.6	2.8
Hereford				0.1					0.5			0.6					
Redditch			1.2					0.1						0.1	0.6		0.1
Birmingham	0.1	1.6	3.9		0.0	0.1	0.7	0.1	0.0	0.1		0.1	0.0	0.1	0.2	0.7	
Bristol						0.1							0.0	0.1			
Gloucester														0.1		0.1	
Leominster				0.0					0.0	0.0							
Stratford upon Avon			0.4			0.1											0.1
Ludlow	0.1			0.1	0.0												
Other	0.2	2.1	1.0	0.2	0.1	0.1	0.6	0.4		0.2	0.1	0.3	0.3	0.7	0.4	0.6	0.5
Total	1.5	14.1	7.8	1.1	1.3	5.2	8.1	5.2	0.9	1.8	5.6	2.2	2.0	4.4	5.3	5.2	7.9

Notes:
 Zonal market shares (Table 5) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 17: Turnover of toys, games, bicycles and other recreational/sports goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.2	0.7	2.0	0.5	3.4	12.5	24.2	12.4	1.0	3.6	6.5	0.8	1.5		6.4	7.0	0.9
Worcester City Centre	0.2	0.7	2.0	0.5	3.0	11.1	22.7	9.8	0.9	3.4	5.3	0.8	1.5		5.5	4.2	0.9
Worcester Out-of-Centre					0.4	0.3	1.5	2.0	0.1						0.9	2.8	
Blackpole Retail Park, Blackpole Road															0.9	2.5	
Elgar Retail Park, Blackpole Road							1.5	0.2								0.3	
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill					0.4	0.3		1.8	0.1								
Other Out-of-Centre																	
Local Centres						1.0		0.6		0.2	1.3						
WYCHAVON DISTRICT							0.7				0.7				6.0	5.3	16.6
Evesham Town Centre																0.3	13.8
Evesham Out-of-Centre											0.7					2.1	2.8
Evesham Retail Park, Worcester Road																1.7	0.9
Four Pools Retail Park, The Link											0.7						0.5
The Valley																0.4	1.5
Other Out-of-Centre																	
Droitwich Town Centre															6.0		
Droitwich Out-of-Centre																0.3	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road																0.3	
Other																	
Pershore Town Centre							0.7									2.5	
Other within Wychavon																	
MALVERN HILLS DISTRICT				0.3		0.2			0.1	0.3	6.3	1.4	1.3				
Great Malvern Town Centre										0.2	2.9						
Malvern Out-of-Centre						0.2			0.1		2.1	1.2	0.8				
Malvern Shopping Park, Roman Way						0.2			0.1		2.1	1.0	0.8				
B&Q, Spring Lane												0.2					
Other																	
Barnards Green District Centre, Malvern										0.2	1.3						
Malvern Link District Centre, Malvern												0.2	0.4				
Tenbury Wells Town Centre				0.3													
Upton-upon-Severn Town Centre													0.1				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	0.2	0.7	2.0	0.7	3.4	12.7	24.9	12.4	1.1	3.9	13.5	2.2	2.9		12.4	12.3	17.4
OUTSIDE SOUTH WORCESTERSHIRE	5.4	48.3	23.6	3.5	2.1	2.9	1.5	3.8	2.7	2.5	4.8	6.0	4.1	13.4	6.8	5.1	10.4
Towns within Survey Area	4.8	47.5	5.7	2.3	1.9		1.5	0.9	0.1	0.7	0.3	2.6	1.4	2.2	3.3		
Kidderminster	4.8	43.0	1.3	2.3	1.9		1.5	0.9		0.2	0.3				2.8		
Bromsgrove			4.4												0.5		
Stourport-on-Severn		4.5															
Tewkesbury													1.2				
Ledbury												2.6	0.2	2.2			
Bromyard									0.1	0.5							
Towns outside Survey Area	0.6	0.9	17.9	1.2	0.2	2.9		2.8	2.6	1.8	4.5	3.4	2.6	11.2	3.5	5.1	10.4
Cheltenham					0.6			1.6		0.2	3.7	0.2	1.6	10.8	0.5	1.9	6.7
Hereford				0.7		0.2			1.4	0.5		2.8				0.4	
Redditch			3.5					0.2							2.1		0.5
Birmingham			12.0		0.2				0.1	0.2	0.3				0.5	2.5	
Bristol						0.3											
Gloucester								0.2	0.2		0.4	0.4	0.1	0.4			
Leominster																	
Stratford upon Avon																0.3	1.7
Ludlow	0.3								0.1								
Other	0.3	0.9	2.4	0.5		1.8		0.8	0.8	1.0			0.9		0.4		1.5
Total	5.6	49.1	25.6	4.2	5.5	15.6	26.4	16.1	3.9	6.4	18.3	8.2	6.9	13.4	19.2	17.4	27.8

Notes:
 Zonal market shares (Table 6) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

Table 18: Turnover of chemist goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.3		0.5	0.1	1.8	11.9	22.3	12.4	0.3	0.7	0.5		0.2		1.1	1.2	
Worcester City Centre	0.3		0.5	0.1	1.5	4.5	14.8	7.0	0.1	0.7	0.1		0.2		1.1	0.9	
Worcester Out-of-Centre					0.0	1.1	5.5	3.9	0.2		0.4		0.1			0.4	
Blackpole Retail Park, Blackpole Road							0.3		0.2								
Elgar Retail Park, Blackpole Road						0.1											
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill					0.0	1.0	5.1	3.9			0.4		0.1			0.4	
Other Out-of-Centre																	
Local Centres					0.2	6.2	2.1	1.5		0.0							
WYCHAVON DISTRICT		0.3		0.0	0.3	0.2	0.2	0.4					0.1	0.3	13.6	11.5	22.3
Evesham Town Centre														0.1		1.1	14.9
Evesham Out-of-Centre														0.1		1.7	6.3
Evesham Retail Park, Worcester Road														0.1		1.6	4.6
Four Pools Retail Park, The Link																	
The Valley																0.1	1.7
Other Out-of-Centre																	
Droitwich Town Centre				0.0	0.1	0.2		0.1							13.3		
Droitwich Out-of-Centre					0.1		0.2								0.3		
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road					0.1		0.2								0.3		
Other																	
Pershore Town Centre					0.1			0.3					0.1	0.1		8.6	
Other within Wychavon		0.3			0.0												1.1
MALVERN HILLS DISTRICT				2.5	0.4	2.0	0.3	1.1	0.1	3.4	16.3	0.3	3.3	0.1			
Great Malvern Town Centre					0.0	0.5				1.0	8.2		0.7				
Malvern Out-of-Centre					0.3	1.1		0.6	0.1	1.7	5.4	0.2	0.3	0.1			
Malvern Shopping Park, Roman Way					0.3	0.9		0.6	0.1	1.5	4.7	0.1	0.3	0.1			
B&Q, Spring Lane																	
Other						0.1				0.1	0.7	0.1	0.1				
Barnards Green District Centre, Malvern										0.0	0.8		0.2				
Malvern Link District Centre, Malvern						0.4	0.3	0.4		0.8	1.7	0.1	0.4				
Tenbury Wells Town Centre				2.5	0.1				0.0		0.1						
Upton-upon-Severn Town Centre													1.6				
Other within Malvern District					0.0			0.2									
SOUTH WORCESTERSHIRE SUB-TOTAL	0.3	0.3	0.5	2.6	2.5	14.1	22.8	14.0	0.4	4.2	16.8	0.3	3.6	0.4	14.7	12.7	22.3
OUTSIDE SOUTH WORCESTERSHIRE	3.8	42.6	21.5	0.5	1.4		0.2	0.3	2.4	0.7	0.4	6.2	2.1	11.3	1.4	1.5	0.3
Towns within Survey Area	1.5	36.9	18.8	0.3	1.3				1.8	0.5	0.1	5.9	1.5	7.4	1.3	0.6	
Kidderminster	1.2	25.3		0.2	0.2										0.1		
Bromsgrove		0.4	18.8	0.0	0.1										1.0		
Stourport-on-Severn	0.3	11.3			0.9										0.2		
Tewkesbury											0.1		1.4			0.6	
Ledbury									1.8	0.3		5.9	0.1	7.4			
Bromyard					0.1												
Towns outside Survey Area	2.3	5.7	2.7	0.2	0.1		0.2	0.3	0.6	0.3	0.3	0.3	0.7	3.8	0.2	0.9	0.3
Cheltenham													0.6	3.0		0.5	0.2
Hereford				0.0					0.5	0.0		0.2				0.1	
Redditch			0.8												0.2	0.3	
Birmingham			1.0														
Bristol																	
Gloucester								0.1					0.1	0.3			
Leominster									0.1	0.1							
Stratford upon Avon				0.2													0.2
Ludlow	0.6			0.0													
Other	1.8	5.7	0.8		0.1		0.2	0.2		0.1	0.3	0.1		0.6			
Total	4.1	42.9	22.0	3.1	3.9	14.1	23.0	14.3	2.8	4.9	17.2	6.4	5.7	11.7	16.1	14.2	22.7

Notes:
 Zonal market shares (Table 7) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 19: Turnover of large household electrical items, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY		0.2	0.2	0.0	0.7	3.2	5.6	2.5	0.1	0.6	2.3	0.0	0.7	0.1	2.3	1.9	0.9
Worcester City Centre		0.2			0.1	0.6	0.6	0.7		0.2	0.6		0.3		0.3		0.5
Worcester Out-of-Centre			0.2	0.0	0.6	2.4	4.8	1.9	0.1	0.4	1.6	0.0	0.3	0.1	2.1	1.9	0.4
Blackpole Retail Park, Blackpole Road			0.2	0.0	0.5	2.3	3.8	1.6	0.1	0.4	1.6	0.0	0.3	0.1	2.1	1.9	0.4
Elgar Retail Park, Blackpole Road					0.0	0.1	0.9	0.2		0.1	0.1		0.0				
Hylto Road Retail Park					0.1	0.0							0.0				
Shrub Hill Retail Park, Tallow Hill										0.0							
Other Out-of-Centre							0.1										
Local Centres					0.0	0.2	0.2										
WYCHAVON DISTRICT		0.1					0.1	0.4						0.1	1.2	2.2	5.1
Evesham Town Centre														0.1		0.8	3.0
Evesham Out-of-Centre								0.0						0.1		1.3	2.2
Evesham Retail Park, Worcester Road														0.1		0.5	0.4
Four Pools Retail Park, The Link								0.0								0.7	1.8
The Valley																	
Other Out-of-Centre																	
Droitwich Town Centre							0.1	0.3							1.2	0.1	
Droitwich Out-of-Centre		0.1															
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road																	
Other		0.1															
Pershore Town Centre																	
Other within Wychavon								0.0								0.1	
MALVERN HILLS DISTRICT	0.2			0.6	0.2	0.2		0.0	0.1	0.6	1.7	0.0	0.5				
Great Malvern Town Centre										0.2	0.5		0.1				
Malvern Out-of-Centre						0.1		0.0		0.3	0.7	0.0	0.1				
Malvern Shopping Park, Roman Way						0.1				0.3	0.6	0.0	0.1				
B&Q, Spring Lane								0.0									
Other											0.1	0.0					
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern					0.0	0.1				0.2	0.5		0.3				
Tenbury Wells Town Centre	0.2			0.6	0.1				0.1								
Upton-upon-Severn Town Centre																	
Other within Malvern District													0.0				
SOUTH WORCESTERSHIRE SUB-TOTAL	0.2	0.3	0.2	0.6	0.9	3.4	5.7	3.0	0.2	1.2	3.9	0.1	1.2	0.2	3.5	4.0	6.0
OUTSIDE SOUTH WORCESTERSHIRE	1.1	11.2	5.3	0.3	0.4	0.2		0.5	0.7	0.4	0.7	1.9	0.9	4.0	0.8	0.3	0.6
Towns within Survey Area	0.9	9.3	2.3	0.2	0.3			0.1	0.1			0.9	0.0	0.5	0.4		
Kidderminster	0.9	8.1	0.9	0.2	0.2			0.1	0.0			0.1		0.4	0.1		
Bromsgrove			1.5		0.0										0.3		
Stourport-on-Severn	0.1	1.2			0.1												
Tewkesbury																	
Ledbury									0.0			0.8		0.1			
Bromyard									0.1								
Towns outside Survey Area	0.2	1.8	3.0	0.2	0.1	0.2		0.4	0.6	0.4	0.7	1.0	0.9	3.5	0.4	0.3	0.6
Cheltenham					0.0			0.3		0.0	0.3	0.1	0.7	2.7			0.6
Hereford				0.1					0.4	0.2	0.1						
Redditch			1.4												0.1	0.1	
Birmingham	0.0	0.2	0.4		0.1				0.1		0.1						
Bristol																	
Gloucester											0.1		0.2	0.1			
Leominster									0.0			0.0		0.7			
Stratford upon Avon																	
Ludlow	0.1			0.0						0.0							
Other	0.1	1.7	1.1	0.0	0.0	0.2		0.1	0.0	0.1	0.1				0.3	0.1	0.1
Total	1.4	11.4	5.5	1.0	1.3	3.6	5.7	3.4	0.9	1.6	4.6	2.0	2.1	4.2	4.3	4.4	6.6

Notes:
 Zonal market shares (Table 8) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 20: Turnover of small electrical goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY		0.6	0.2		1.4	9.0	13.4	8.4	0.2	0.9	3.2		0.4		3.2	4.5	
Worcester City Centre		0.3	0.2		0.6	3.1	1.5	3.2	0.0	0.1	0.6		0.1		0.6	1.4	
Worcester Out-of-Centre		0.3			0.7	4.8	11.9	4.8	0.1	0.7	2.6		0.3		2.7	3.1	
Blackpole Retail Park, Blackpole Road		0.3			0.6	4.3	7.6	2.9	0.1	0.5	2.5		0.2		2.7	3.0	
Elgar Retail Park, Blackpole Road					0.0	0.1	3.2	0.3		0.0							
Hylto Road Retail Park						0.3											
Shrub Hill Retail Park, Tallow Hill					0.1	0.1	1.1	1.6	0.0	0.1	0.1		0.0			0.1	
Other Out-of-Centre																	
Local Centres					0.1	1.2		0.4		0.1			0.0				
WYCHAVON DISTRICT				0.1	0.1		0.2	0.2							5.6	3.7	11.9
Evesham Town Centre																0.9	6.1
Evesham Out-of-Centre																2.4	5.8
Evesham Retail Park, Worcester Road																1.0	2.7
Four Pools Retail Park, The Link																1.3	2.3
The Valley																	
Other Out-of-Centre																0.1	0.8
Droitwich Town Centre					0.0		0.2	0.1							5.4		
Droitwich Out-of-Centre				0.1	0.0										0.3	0.1	
Droitwich Spa Retail Park, Kidderminster Road																	
Roman Way Retail Park, Kidderminster Road				0.1													
Other					0.0										0.3	0.1	
Pershore Town Centre																0.4	
Other within Wychavon								0.1									
MALVERN HILLS DISTRICT	0.2			0.9	0.1	0.5	0.4		0.1	1.3	5.5	0.2	1.5			0.1	
Great Malvern Town Centre					0.0					0.1	2.1		0.1				
Malvern Out-of-Centre						0.4			0.1	0.7	2.8	0.2	0.8			0.1	
Malvern Shopping Park, Roman Way						0.3			0.1	0.6	2.7	0.2	0.7			0.1	
B&Q, Spring Lane						0.1											
Other										0.1	0.1	0.0	0.1				
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern						0.2	0.4			0.4	0.6		0.4				
Tenbury Wells Town Centre	0.2			0.9	0.1				0.0								
Upton-upon-Severn Town Centre													0.1				
Other within Malvern District																	
SOUTH WORCESTERSHIRE SUB-TOTAL	0.2	0.6	0.2	1.0	1.6	9.6	14.0	8.6	0.2	2.2	8.8	0.2	1.9		8.8	8.3	11.9
OUTSIDE SOUTH WORCESTERSHIRE	2.2	25.2	13.5	0.7	0.8	0.1	0.4	0.3	1.2	0.8	1.1	3.4	1.6	7.9	1.0	0.3	1.6
Towns within Survey Area	2.0	22.3	8.9	0.5	0.8				0.1	0.2		2.1	0.6	1.5	0.1		
Kidderminster	1.9	20.4	1.7	0.5	0.5												
Bromsgrove	0.0		7.2		0.1										0.1		
Stourport-on-Severn		2.0			0.2												
Tewkesbury													0.3	1.5			
Ledbury										0.1		2.1	0.3				
Bromyard					0.0				0.1	0.1							
Towns outside Survey Area	0.3	2.8	4.6	0.2		0.1	0.4	0.3	1.0	0.5	1.1	1.3	1.0	6.5	0.8	0.3	1.6
Cheltenham				0.0							0.3			6.0			0.4
Hereford				0.2					0.8	0.4		1.0	1.0				
Redditch			0.6														0.8
Birmingham			2.5				0.2		0.1		0.2				0.4	0.2	
Bristol											0.1				0.1		
Gloucester										0.0				0.5			
Leominster				0.0					0.1		0.2	0.1	0.0				
Stratford upon Avon																	0.3
Ludlow	0.1																
Other	0.1	2.8	1.5			0.1	0.2	0.3		0.1	0.2				0.3	0.1	0.1
Total	2.4	25.8	13.7	1.6	2.4	9.7	14.4	8.9	1.4	3.0	9.9	3.7	3.5	7.9	9.8	8.6	13.5

Notes:
 Zonal market shares (Table 9) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 21: Turnover of furniture, carpets and floor coverings, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.1	0.3	0.6	0.0	0.5	3.4	6.6	3.4	0.0	0.6	1.5	0.3	0.6		1.1	0.7	1.2
Worcester City Centre	0.1		0.1	0.0	0.2	1.3	1.6	1.1		0.2	1.0	0.1	0.1		0.6	0.2	
Worcester Out-of-Centre	0.1	0.3	0.5		0.4	1.4	5.0	2.2	0.0	0.4	0.5	0.1	0.5		0.5	0.5	1.2
Blackpole Retail Park, Blackpole Road	0.1	0.3	0.5		0.3	1.3	3.7	1.7	0.0	0.3	0.5	0.1	0.4		0.5	0.4	1.2
Elgar Retail Park, Blackpole Road					0.0	0.1	1.2	0.5	0.0	0.1			0.0			0.1	
Hylto Road Retail Park																	
Shrub Hill Retail Park, Tallow Hill							0.1										
Other Out-of-Centre												0.0					
Local Centres						0.7											
WYCHAVON DISTRICT	0.0	0.7	0.7	0.1	0.2	0.4	0.2	0.3						0.1	4.1	3.7	4.1
Evesham Town Centre																0.2	2.1
Evesham Out-of-Centre																1.0	2.0
Evesham Retail Park, Worcester Road																	0.3
Four Pools Retail Park, The Link																0.4	1.6
The Valley																0.7	0.1
Other Out-of-Centre																	
Droitwich Town Centre			0.1			0.1		0.1							3.7		
Droitwich Out-of-Centre	0.0	0.7	0.6	0.1	0.2	0.4	0.2	0.1						0.1	0.4	0.6	
Droitwich Spa Retail Park, Kidderminster Road			0.1													0.1	
Roman Way Retail Park, Kidderminster Road	0.0	0.7	0.5	0.1	0.2	0.4	0.2	0.1						0.1	0.4	0.5	
Other																	
Pershore Town Centre								0.1								1.8	
Other within Wychavon																0.2	
MALVERN HILLS DISTRICT				0.4	0.1	0.7	0.1	0.3	0.0	0.9	3.5	0.0	0.4				
Great Malvern Town Centre					0.1	0.2				0.3	2.1	0.0	0.1				
Malvern Out-of-Centre						0.3			0.0	0.2	0.1						
Malvern Shopping Park, Roman Way						0.3			0.0	0.2	0.1						
B&Q, Spring Lane																	
Other																	
Barnards Green District Centre, Malvern										0.0							
Malvern Link District Centre, Malvern						0.3	0.1	0.2	0.0	0.3	1.3		0.2				
Tenbury Wells Town Centre				0.4	0.1			0.1									
Upton-upon-Severn Town Centre													0.1				
Other within Malvern District										0.0							
SOUTH WORCESTERSHIRE SUB-TOTAL	0.1	1.0	1.3	0.5	0.8	4.6	6.9	3.9	0.1	1.4	5.0	0.3	1.0	0.1	5.2	4.4	5.3
OUTSIDE SOUTH WORCESTERSHIRE	1.9	16.1	7.2	1.0	1.1	0.7	1.0	1.3	1.3	0.9	1.7	2.7	1.7	4.6	1.4	1.9	3.7
Towns within Survey Area	1.4	14.6	4.1	0.6	0.7	0.5	0.2	0.3	0.4	0.3	0.3	1.5	0.4	0.7	0.8	0.2	
Kidderminster	1.4	13.9	0.4	0.5	0.6	0.3	0.2	0.3	0.0	0.2			0.0		0.3	0.1	
Bromsgrove			3.7			0.1									0.5		
Stourport-on-Severn		0.7															
Tewkesbury													0.2				
Ledbury	0.0								0.0	0.0	0.3	1.5	0.1	0.7		0.1	
Bromyard				0.1	0.1				0.4	0.0			0.0				
Towns outside Survey Area	0.4	1.5	3.2	0.4	0.4	0.3	0.8	1.0	0.9	0.6	1.4	1.2	1.4	4.0	0.6	1.7	3.7
Cheltenham					0.1		0.2	0.2	0.0	0.1	0.5	0.1	1.0	3.7	0.1	1.0	3.4
Hereford				0.3	0.1				0.6	0.2	0.2	0.9					
Redditch			1.0													0.4	
Birmingham			1.3					0.1	0.1	0.1			0.0				
Bristol								0.1		0.1			0.2				
Gloucester											0.1	0.1	0.1	0.1			
Leominster									0.1					0.2	0.1		
Stratford upon Avon				0.0													
Ludlow	0.3																0.2
Other	0.1	1.5	0.9	0.0	0.2	0.3	0.5	0.7	0.1	0.1	0.2	0.0	0.0		0.4	0.2	0.2
Total	2.0	17.1	8.5	1.5	1.9	5.4	7.9	5.2	1.3	2.3	6.6	3.0	2.7	4.7	6.5	6.3	9.1

Notes:
 Zonal market shares (Table 10) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 22: Turnover of DIY (including gardening) goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY			0.1	0.1	1.4	7.9	14.1	7.9	0.3	1.0	0.6		0.3		1.9	2.2	
Worcester City Centre					0.3	0.6	1.7	1.8	0.0	0.2	0.1		0.0		0.7	0.1	
Worcester Out-of-Centre			0.1	0.1	1.1	7.2	12.4	6.0	0.2	0.8	0.5		0.2		1.2	2.1	
Blackpole Retail Park, Blackpole Road			0.1	0.0	0.2	0.6	4.0	1.2	0.1	0.1	0.4				0.4	0.2	
Elgar Retail Park, Blackpole Road					0.3	0.2	3.6	1.5	0.1	0.2			0.1		0.4		
Hylto Road Retail Park				0.0	0.6	5.0	2.8	1.0	0.1	0.2			0.0		0.1	0.1	
Shrub Hill Retail Park, Tallow Hill					1.1	0.6	0.6	0.6								0.2	
Other Out-of-Centre				0.0	0.1	0.3	1.3	1.7	0.0	0.3	0.1		0.1		0.4	1.6	
Local Centres						0.1		0.2									
WYCHAVON DISTRICT				0.0	0.1	0.2	0.2	0.2			0.3			0.3	8.4	8.0	15.4
Evesham Town Centre														0.1		0.3	4.4
Evesham Out-of-Centre						0.1					0.2			0.2		6.3	9.3
Evesham Retail Park, Worcester Road																0.4	1.3
Four Pools Retail Park, The Link											0.2				0.2	5.5	6.5
The Valley						0.1								0.1		0.3	
Other Out-of-Centre																0.1	1.4
Droitwich Town Centre					0.0			0.1							3.2	0.1	
Droitwich Out-of-Centre				0.0	0.0	0.1	0.2				0.1				5.2		
Droitwich Spa Retail Park, Kidderminster Road															1.7		
Roman Way Retail Park, Kidderminster Road				0.0	0.0	0.1	0.2				0.1				2.5		
Other															0.9		
Pershore Town Centre								0.1								1.3	
Other within Wychavon																	1.7
MALVERN HILLS DISTRICT	0.1			0.8	0.1	1.8	0.5	0.6	0.1	1.8	10.1	0.0	1.9	0.1			
Great Malvern Town Centre						0.2				0.1	1.3						
Malvern Out-of-Centre					0.1	1.1		0.6	0.1	1.4	6.9	0.0	0.6				
Malvern Shopping Park, Roman Way						0.2		0.1		0.2	0.8						
B&Q, Spring Lane					0.1	0.9		0.5	0.1	1.0	4.7	0.0	0.5				
Other						0.1				0.2	1.5		0.2				
Barnards Green District Centre, Malvern																	
Malvern Link District Centre, Malvern						0.5				0.3	1.8		0.8	0.1			
Tenbury Wells Town Centre	0.0			0.7													
Upton-upon-Severn Town Centre							0.5						0.5				
Other within Malvern District	0.0			0.1	0.0						0.1						
SOUTH WORCESTERSHIRE SUB-TOTAL	0.1		0.1	0.9	1.6	9.8	14.8	8.7	0.3	2.8	11.0	0.0	2.2	0.4	10.3	10.2	15.4
OUTSIDE SOUTH WORCESTERSHIRE	3.0	29.5	15.2	1.2	1.4	0.2	0.3	1.1	1.6	0.9	0.7	4.4	1.7	6.4	1.4	0.3	0.5
Towns within Survey Area	2.1	29.5	12.1	0.5	1.2	0.2	0.3	1.0	0.3	0.5	0.7	4.1	0.7	2.1	1.1	0.1	0.2
Kidderminster	1.9	25.7	0.4	0.5	0.7	0.2	0.3	0.3	0.0		0.4				0.3		0.2
Bromsgrove			11.7					0.6							0.8		
Stourport-on-Severn	0.1	3.9			0.4								0.0				
Tewkesbury										0.1			0.5			0.1	
Ledbury	0.0							0.1		0.4	0.2	4.1	0.2	2.1			
Bromyard									0.3	0.1							
Towns outside Survey Area	0.8		3.1	0.7	0.2			0.1	1.3	0.3		0.3	1.0	4.3	0.3	0.2	0.3
Cheltenham																	
Hereford				0.1	0.0				0.6	0.3		0.1	0.6	3.4			
Redditch			2.0												0.3	0.2	
Birmingham			0.2					0.1									
Bristol																	
Gloucester													0.4	0.4			
Leominster	0.2			0.6					0.6								
Stratford upon Avon																	0.1
Ludlow	0.5			0.1	0.2												
Other	0.2		0.9	0.0	0.0				0.1			0.1		0.5			0.1
Total	3.0	29.5	15.3	2.2	3.0	10.0	15.2	9.8	1.9	3.7	11.7	4.5	3.9	6.7	11.7	10.6	15.9

Notes:
 Zonal market shares (Table 11) applied to available relevant expenditure per zone
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 23: Turnover bulky comparison goods, by Zone (£m)

	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	0.1	0.4	0.9	0.1	2.7	14.5	26.4	13.8	0.4	2.2	4.3	0.3	1.6	0.1	5.4	4.8	2.1
Worcester City Centre	0.1	0.2	0.1	0.0	0.6	2.6	4.0	3.6	0.0	0.6	1.7	0.1	0.5		1.5	0.3	0.5
Worcester Out-of-Centre	0.1	0.3	0.8	0.1	2.1	11.0	22.2	10.1	0.4	1.6	2.6	0.1	1.1	0.1	3.8	4.4	1.6
Blackpole Retail Park, Blackpole Road	0.1	0.3	0.8	0.1	1.0	4.1	11.5	4.5	0.2	0.8	2.4	0.1	0.7	0.1	3.0	2.5	1.6
Elgar Retail Park, Blackpole Road					0.3	0.4	5.8	2.2	0.1	0.3	0.1		0.2		0.4	0.1	
Hylto Road Retail Park				0.0	0.7	5.1	2.8	1.0	0.1	0.2			0.1		0.1	0.1	
Shrub Hill Retail Park, Tallow Hill						1.1	0.7	0.6		0.0						0.2	
Other Out-of-Centre				0.0	0.1	0.3	1.5	1.7	0.0	0.3	0.1	0.0	0.1		0.4	1.6	
Local Centres					0.0	1.0	0.2	0.2									
WYCHAVON DISTRICT	0.0	0.8	0.7	0.1	0.2	0.6	0.4	0.9			0.3			0.5	13.7	13.9	24.7
Evesham Town Centre														0.1		1.3	9.5
Evesham Out-of-Centre						0.1		0.0			0.2			0.3		8.6	13.5
Evesham Retail Park, Worcester Road														0.1		0.9	2.0
Four Pools Retail Park, The Link								0.0			0.2			0.2		6.6	10.0
The Valley						0.1								0.1		0.9	0.1
Other Out-of-Centre																0.1	1.4
Droitwich Town Centre			0.1		0.0	0.1	0.1	0.5								8.1	0.2
Droitwich Out-of-Centre	0.0	0.8	0.6	0.1	0.2	0.4	0.4	0.1			0.1			0.1	5.6	0.6	
Droitwich Spa Retail Park, Kidderminster Road			0.1												1.7	0.1	
Roman Way Retail Park, Kidderminster Road	0.0	0.7	0.5	0.1	0.2	0.4	0.2	0.1			0.1			0.1	2.9	0.5	
Other		0.1		0.0		0.1	0.2								0.9		
Pershore Town Centre								0.2									3.1
Other within Wychavon								0.0								0.2	1.7
MALVERN HILLS DISTRICT	0.3			1.8	0.4	2.7	0.6	0.9	0.2	3.3	15.2	0.1	2.8	0.1			
Great Malvern Town Centre					0.1	0.3				0.5	3.9	0.0	0.1				
Malvern Out-of-Centre					0.1	1.6		0.6	0.1	1.8	7.7	0.1	0.8				
Malvern Shopping Park, Roman Way						0.6		0.1	0.0	0.6	1.5	0.0	0.1				
B&Q, Spring Lane					0.1	0.9		0.5	0.1	1.0	4.7	0.0	0.5				
Other						0.1				0.2	1.5	0.0	0.2				
Barnards Green District Centre, Malvern										0.0							
Malvern Link District Centre, Malvern					0.0	0.9	0.1	0.2	0.0	0.8	3.6		1.2	0.1			
Tenbury Wells Town Centre	0.2			1.7	0.2			0.1	0.1								
Upton-upon-Severn Town Centre							0.5						0.6				
Other within Malvern District	0.0			0.1	0.0					0.0	0.1		0.0				
SOUTH WORCESTERSHIRE SUB-TOTAL	0.4	1.3	1.6	2.0	3.3	17.9	27.5	15.5	0.6	5.5	19.8	0.4	4.4	0.6	19.0	18.7	26.7
OUTSIDE SOUTH WORCESTERSHIRE	6.0	56.8	27.7	2.6	2.9	1.1	1.3	2.8	3.5	2.1	3.0	9.0	4.3	15.0	3.5	2.5	4.8
Towns within Survey Area	4.5	53.4	18.5	1.3	2.1	0.6	0.6	1.4	0.8	0.8	1.0	6.5	1.1	3.2	2.3	0.3	0.2
Kidderminster	4.2	47.7	1.7	1.2	1.5	0.5	0.6	0.6	0.1	0.2	0.4	0.1	0.0	0.4	0.7	0.1	0.2
Bromsgrove			16.8		0.0	0.1		0.7							1.5		
Stourport-on-Severn	0.2	5.7			0.5								0.0				
Tewkesbury											0.1					0.1	
Ledbury	0.1							0.1	0.1	0.5	0.5	6.5	0.7	2.8		0.1	
Bromyard				0.1	0.1				0.7	0.2			0.3			0.1	
Towns outside Survey Area	1.5	3.3	9.2	1.3	0.7	0.5	0.8	1.4	2.7	1.3	2.0	2.4	3.2	11.8	1.3	2.2	4.6
Cheltenham					0.1		0.2	0.5	0.0	0.1	0.8	0.2	2.3	9.8	0.1	1.0	4.0
Hereford				0.6	0.1				1.7	0.8	0.3	1.8					
Redditch			4.4						0.1							0.7	
Birmingham	0.0	0.2	1.9		0.1				0.1	0.2	0.1		0.0			0.1	
Bristol									0.1		0.1		0.2				
Gloucester											0.4	0.2	0.6	0.1	0.1		
Leominster	0.2			0.6					0.7			0.0					
Stratford upon Avon																	0.3
Ludlow	0.9			0.1	0.2					0.0							
Other	0.4	3.2	2.9	0.1	0.3	0.5	0.5	0.8	0.1	0.2	0.3	0.2	0.0	0.5	0.7	0.3	0.3
Total	6.4	58.1	29.3	4.6	6.1	19.0	28.8	18.4	4.1	7.6	22.9	9.4	8.7	15.6	22.6	21.2	31.6

Notes:
Derived from Tables 19, 21 & 22
Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 24: Turnover of non-bulky comparison goods (excluding clothing and footwear) , by Zone (£m)

	Zones																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
WORCESTER CITY	1.3	6.1	4.9	1.0	11.0	52.6	92.7	52.6	2.6	8.9	19.7	1.0	4.1		23.7	22.8	4.3
Worcester City Centre	1.2	3.7	3.9	1.0	7.8	30.5	56.9	31.3	1.8	7.3	12.0	0.9	3.3		15.7	13.0	3.6
Worcester Out-of-Centre	0.1	2.3	1.0	0.0	2.8	10.8	33.8	18.9	0.8	1.2	6.4	0.0	0.8		8.0	9.8	0.7
Blackpole Retail Park, Blackpole Road	0.0	1.4	0.5	0.0	1.5	5.7	12.8	5.8	0.2	0.7	3.4		0.3		6.1	5.7	0.6
Elgar Retail Park, Blackpole Road	0.0	0.9	0.5		0.6	3.0	12.0	2.3	0.4	0.3	1.3	0.0	0.2		1.7	3.3	0.1
Hylto Road Retail Park						0.3		0.1									
Shrub Hill Retail Park, Tallow Hill					0.7	1.8	8.8	10.7	0.2	0.1	1.6		0.2		0.2	0.8	
Other Out-of-Centre																	
Local Centres					0.3	11.3	2.1	2.4		0.5	1.4		0.0				
WYCHAVON DISTRICT	0.1	0.3	1.2	0.1	0.6	0.5	1.8	0.8			0.7		0.1	0.4	33.8	27.5	66.7
Evesham Town Centre	0.0							0.2						0.1		3.9	46.2
Evesham Out-of-Centre					0.1						0.7			0.1	0.1	8.7	19.4
Evesham Retail Park, Worcester Road														0.1		5.0	10.6
Four Pools Retail Park, The Link											0.7					1.5	3.0
The Valley					0.1										0.1	0.4	0.8
Other Out-of-Centre																1.8	5.1
Droitwich Town Centre	0.0		0.1	0.1	0.2	0.3	0.8	0.2							32.5		
Droitwich Out-of-Centre	0.1		0.8	0.1	0.2	0.1	0.2								1.1	0.5	
Droitwich Spa Retail Park, Kidderminster Road	0.0		0.1												0.2		
Roman Way Retail Park, Kidderminster Road	0.0		0.8	0.1			0.2								0.2		
Other					0.2	0.1									0.8	0.5	
Pershore Town Centre					0.1		0.7	0.3					0.1	0.2		14.4	
Other within Wychavon		0.3	0.3		0.0		0.2	0.1									1.1
MALVERN HILLS DISTRICT	0.2			5.0	0.8	5.0	0.8	1.7	0.5	6.8	42.9	2.9	9.0	0.2	0.1	1.0	
Great Malvern Town Centre				0.0	0.1	1.1	0.1		0.2	2.3	23.1	0.2	1.6			0.2	
Malvern Out-of-Centre					0.3	2.9		1.0	0.3	2.8	14.0	2.4	3.2	0.2		0.8	
Malvern Shopping Park, Roman Way					0.3	2.1		1.0	0.2	2.3	12.8	2.0	2.2	0.2		0.8	
B&Q, Spring Lane						0.1				0.0							
Other						0.7			0.0	0.5	1.2	0.4	1.0				
Barnards Green District Centre, Malvern										0.3	2.4		0.2				
Malvern Link District Centre, Malvern				0.0		0.9	0.7	0.5		1.4	3.1	0.3	1.9		0.1		
Tenbury Wells Town Centre	0.2			4.9	0.2			0.0	0.1		0.3						
Upton-upon-Severn Town Centre													2.1				
Other within Malvern District				0.0	0.2	0.1		0.2		0.1							
SOUTH WORCESTERSHIRE SUB-TOTAL	1.6	6.4	6.1	6.1	12.4	58.1	95.4	55.1	3.0	15.7	63.3	3.9	13.3	0.6	57.6	51.4	71.0
OUTSIDE SOUTH WORCESTERSHIRE	17.8	179.5	90.4	8.1	6.1	4.8	4.1	6.8	9.7	7.1	8.8	25.1	12.6	51.1	13.4	13.2	30.0
Towns within Survey Area	12.3	156.5	46.3	4.2	5.0	0.3	1.6	1.2	2.4	1.7	0.6	14.9	4.2	16.4	6.1	0.6	0.1
Kidderminster	11.6	128.5	3.6	4.1	3.4	0.3	1.6	1.2		0.2	0.3				3.6		
Bromsgrove	0.0	0.7	42.8	0.0	0.1										2.2		
Stourport-on-Severn	0.7	27.3			1.2										0.2		
Tewkesbury											0.1		3.4	16.4	0.1	0.6	0.1
Ledbury	0.0			0.0						1.0	0.1	14.9	0.8				
Bromyard				0.0	0.2				2.4	0.5							
Towns outside Survey Area	5.5	22.9	44.1	3.9	1.1	4.5	2.5	5.6	7.3	5.4	8.2	10.2	8.4	34.8	7.3	12.6	29.8
Cheltenham				0.1	0.1	1.1	0.1	1.7	0.0	0.3	4.7	0.7	5.5	31.3	0.6	5.9	16.1
Hereford	0.1			1.9		0.2			5.1	2.0	0.1	7.8	0.3			0.5	
Redditch			10.8					0.3						0.1	3.7	0.5	2.7
Birmingham	0.3	2.9	21.3	0.0	0.4	0.1	1.0	0.3	0.5	0.5	1.1	0.1	0.1	0.1	1.0	3.5	1.1
Bristol					0.1	0.4				0.1	0.4	0.4	0.4	0.4	0.1	0.4	0.1
Gloucester								0.5	0.2	0.2	0.6	1.2	0.5	1.4	0.2	0.1	0.3
Leominster				0.5					0.4	0.1		0.1					
Stratford upon Avon			0.4			0.1										0.5	5.5
Ludlow	1.7			0.2	0.0				0.1								
Other	3.4	20.0	11.6	1.1	0.5	2.5	1.4	2.7	0.9	2.3	1.3	0.5	1.7	1.5	1.8	1.2	4.0
Total	19.4	185.9	96.5	14.2	18.5	62.8	99.5	61.9	12.7	22.8	72.1	29.0	25.9	51.8	71.0	64.6	100.9

Notes:
 Derived from Tables 13-18 & 20
 Figures may not add due to rounding

2017 Prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

Table 25: Turnover of comparison goods (combined), by Zone (£m)

	Zone																	Total Survey Derived Turnover		Inflow	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	%	£m	%	£m
WORCESTER CITY	2.5	16.2	7.3	2.4	18.9	91.9	164.2	88.9	4.7	14.9	34.0	1.7	7.0	0.2	49.8	42.4	13.4	31	560.5		
Worcester City Centre	2.4	13.6	5.5	2.3	13.6	56.2	106.0	56.2	3.4	11.6	23.6	1.6	5.0	0.2	37.9	28.1	11.1	21	378.3	5	18.9
Worcester Out-of-Centre	0.1	2.6	1.8	0.1	4.9	22.3	56.0	29.9	1.2	2.8	9.0	0.2	1.9	0.1	11.9	14.3	2.3	9	161.2		
Blackpole Retail Park, Blackpole Road	0.1	1.7	1.3	0.1	2.5	9.9	24.3	10.2	0.4	1.5	5.8	0.1	1.0	0.1	9.1	8.2	2.2	4	78.5		
Elgar Retail Park, Blackpole Road	0.0	0.9	0.5		1.0	3.9	17.8	4.6	0.5	0.6	1.4	0.0	0.4		2.1	3.4	0.1	2	37.2		
Hylto Road Retail Park				0.0	0.7	5.3	2.8	1.1	0.1	0.2			0.1		0.1	0.1		1	10.5		
Shrub Hill Retail Park, Tallow Hill						1.1	0.9	0.6		0.0						0.2		0	2.8		
Other Out-of-Centre				0.0	0.8	2.2	10.2	13.3	0.2	0.5	1.7	0.0	0.3		0.6	2.4		2	32.2		
Local Centres					0.4	13.3	2.2	2.9	0.1	0.5	1.4		0.1					1	21.0		
WYCHAVON DISTRICT	0.2	1.2	3.2	0.2	0.9	1.0	2.8	2.5		0.1	1.4		0.4	1.1	56.2	46.9	105.2	12	223.2		
Evesham Town Centre	0.0		0.8					0.2						0.2		6.0	66.5	4	73.7	2	1.1
Evesham Out-of-Centre			0.5		0.1	0.1		0.0			1.3			0.4	0.1	19.2	35.2	3	56.9		
Evesham Retail Park, Worcester Road											0.4			0.2		6.8	13.8	1	21.1		
Four Pools Retail Park, The Link								0.0			0.9			0.2		8.2	13.0	1	22.2		
The Valley			0.5		0.1	0.1								0.1	0.1	1.9	1.5	0	4.2		
Other Out-of-Centre																2.4	6.8	1	9.3		
Droitwich Town Centre	0.1		0.2	0.1	0.3	0.4	1.3	1.2								49.0	0.2	3	52.8	2	0.8
Droitwich Out-of-Centre	0.1	0.8	1.4	0.1	0.4	0.6	0.6	0.1			0.1			0.1	7.1	1.1		1	12.4		
Droitwich Spa Retail Park, Kidderminster Road	0.0		0.2												1.9	0.1		0	2.2		
Roman Way Retail Park, Kidderminster Road	0.1	0.7	1.2	0.1	0.2	0.4	0.4	0.1			0.1			0.1	3.1	0.5		0	6.9		
Other		0.1		0.0	0.2	0.2	0.2								2.0	0.5		0	3.3		
Pershore Town Centre					0.1		0.7	0.5					0.4	0.4		20.2	0.3	1	22.7	2	0.3
Other within Wychavon		0.3	0.3		0.0		0.2	0.4		0.1						0.2	3.2	0	4.7		
MALVERN HILLS DISTRICT	0.5	1.7		7.3	1.5	15.3	3.3	8.0	1.3	13.9	78.6	8.2	15.1	0.3	0.8	1.8		9	157.6		
Great Malvern Town Centre				0.0	0.2	2.0	0.1		0.2	3.9	32.3	1.9	2.7			0.2		2	43.5	5	2.2
Malvern Out-of-Centre		1.7			0.6	10.1	0.9	6.8	1.0	6.9	35.4	5.8	5.4	0.2	0.7	1.6		4	77.2		
Malvern Shopping Park, Roman Way		1.7			0.5	8.3	0.9	6.3	0.8	5.2	28.1	5.3	3.8	0.2	0.7	1.6		3	63.5		
B&Q, Spring Lane					0.1	1.0		0.5	0.1	1.0	4.7	0.0	0.5					0	7.8		
Other						0.8			0.0	0.7	2.7	0.4	1.2					0	5.8		
Barnards Green District Centre, Malvern										0.3	2.4	0.1	0.2					0	3.0		
Malvern Link District Centre, Malvern				0.0	0.1	3.1	1.8	0.9	0.0	2.6	8.1	0.4	3.9	0.1	0.1			1	21.2		
Tenbury Wells Town Centre	0.5			7.1	0.4			0.1	0.1		0.3							0	8.5	2	0.2
Upton-upon-Severn Town Centre							0.5						2.8					0	3.4	2	0.1
Other within Malvern District	0.0			0.2	0.2	0.1		0.2		0.1	0.1		0.0					0	0.9		
SOUTH WORCESTERSHIRE SUB-TOTAL	3.2	19.0	10.5	9.9	21.2	108.2	170.3	99.4	6.0	28.9	114.0	9.9	22.5	1.6	106.8	91.1	118.6	52	941.3		
OUTSIDE SOUTH WORCESTERSHIRE	31.3	318.9	163.8	15.5	11.2	6.9	9.8	12.7	16.8	11.5	17.5	42.2	22.7	87.9	21.1	23.8	63.5	48	877.3		
Towns within Survey Area	22.2	268.8	77.7	6.8	8.1	0.9	2.2	2.6	3.5	2.7	1.6	22.5	5.8	24.9	8.3	1.2	0.4	25	460.2		
Kidderminster	21.2	225.7	6.4	6.7	5.3	0.8	2.2	1.8	0.1	0.5	0.7	0.1	0.1	0.4	4.3	0.1	0.2	15	276.6		
Bromsgrove	0.0	0.7	71.2	0.0	0.2	0.1		0.7							3.7			4	76.7		
Stourport-on-Severn	1.0	42.4			2.4								0.0		0.2			3	46.0		
Tewkesbury											0.2		4.3	24.5	0.1	0.7	0.1	2	29.9		
Ledbury	0.1			0.0				0.1	0.1	1.4	0.7	22.4	1.3			0.4		1	26.5		
Bromyard				0.1	0.3				3.3	0.8			0.0					0	4.5		
Towns outside Survey Area	9.1	50.1	86.1	8.7	3.1	6.0	7.6	10.1	13.3	8.9	15.9	19.7	16.9	63.0	12.8	22.7	63.1	23	417.1		
Cheltenham				0.1	0.2	1.4	0.3	4.1	0.3	0.9	10.1	1.7	10.4	55.1	0.7	13.5	37.6	7	136.3		
Hereford	0.1			4.1	0.1	0.2			9.2	4.1	0.4	15.1	0.3			0.5		2	34.0		
Redditch			26.6			0.3		0.4						0.1	5.9	2.1	4.4	2	39.7		
Birmingham	0.4	5.2	36.2	0.0	0.8	0.1	2.6	0.4	0.7	0.6	1.5	0.2	0.2	0.3	1.7	3.6	1.1	3	55.5		
Bristol					0.2	0.4		0.1		0.2	0.5		0.5	0.9	0.4	0.4	0.5	0	4.1		
Gloucester					0.1			0.8	0.3	0.5	1.1	1.5	2.5	3.1	0.7	0.6	1.9	1	13.0		
Leominster	0.2			1.5					1.2	0.1		0.1						0	3.1		
Stratford upon Avon			0.4			0.3										0.5	12.9	1	14.2		
Ludlow	2.9			0.6	0.3				0.3	0.0								0	4.2		
Other	5.5	45.0	23.0	2.3	1.4	3.2	4.8	4.4	1.4	2.6	2.2	1.1	2.9	3.5	3.5	1.4	4.7	6	112.9		
Total	34.6	338.0	174.3	25.4	32.5	115.2	180.1	112.1	22.9	40.4	131.4	52.1	45.2	89.6	127.9	114.9	182.0	100	1,819		

Notes:
 Derived from Tables 12-22
 Figures may not add due to rounding

2017 Prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 26: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN WORCESTER

Table 26a: Estimated 'Capacity' for Comparison Goods Facilities - Worcester

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	579.4	560.5	18.9	0.0
2025	681.8	671.2	22.6	12.0
2029	746.8	769.1	26.0	48.3
2035	855.9	980.5	33.1	157.6
2041	981.1	1,165	39.3	223.7
Market Share	30.8			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2. Assumes constant market share claimed by Worcester facilities from Study Area

2017 prices

Table 26b: Quantitative Need for Additional Comparison Goods Floorspace - Worcester

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	12.0	1,700	2,500
2029	48.3	6,200	9,400
2035	157.6	17,800	26,700
2041	223.7	22,000	33,000

Notes:

1. Average sales density assumed to be circa £6,000 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Worcester

2. Average sales density assumed to be circa £4,000 per sq.m (@ 2019) which WYG considers to be towards the lower end of what could be achieved in Worcester

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 27: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN EVESHAM

Table 27a: Estimated 'Capacity' for Comparison Goods Facilities - Evesham

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	131.7	130.6	1.1	0.0
2025	155.0	156.4	1.3	2.7
2029	169.8	179.2	1.5	11.0
2035	194.6	228.5	1.9	35.8
2041	223.0	271.6	2.3	50.9
Market Share	7.2			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)
2. Assumes constant market share claimed by Evesham facilities from Study Area

2017 prices

Table 27b: Quantitative Need for Additional Comparison Goods Floorspace - Evesham

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	2.7	400	700
2029	11.0	1,600	2,600
2035	35.8	4,600	7,500
2041	50.9	5,700	9,200

Notes:

1. Average sales density assumed to be circa £5,250 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Evesham
 2. Average sales density assumed to be circa £3,250 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Evesham
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY



Table 27c: Extant Comparison Goods Commitments, 2019 - Evesham

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Comparison Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Comparison Turnover (£m)	Status
Sinclair Retail Park	17/01606 & 16/01418/PN	Proposed retail development, 10-10A Davies Road, Evesham Unit A - TK Maxx	1,868	1,500	4,000	6.0	Currently being implemented
		Proposed retail development, 10-10A Davies Road, Evesham Unit A - Home Bargains	1,202	1,000	3,000	3.0	
TOTAL				2,500		9.0	

Notes:

Commitment details provided by South Worcestershire Councils

Sinclair Retail Park

Floorspace details from planning application documents

Sales density figures derived from information derived from Mintel Retail Rankings 2018

2017 prices

Table 27d: Net Quantitative Need for Additional Comparison Goods Floorspace - Evesham

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)	
				Min ¹	Max ²
2019	0.0	-	-	-	-
2025	2.7	10.6	-7.9	-	-
2029	11.0	11.6	-0.6	-	-
2035	35.8	13.3	22.5	2,900	4,700
2041	50.9	15.2	35.6	4,000	6,500

Notes:

1. Average sales density assumed to be circa £5,250 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Evesham

2. Average sales density assumed to be circa £3,250 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Evesham

Residual calculated by subtracting turnover of commitments (sourced from Table 27c) from surplus expenditure (sourced from Table 27a)

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 28: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN DROITWICH

Table 28a: Estimated 'Capacity' for Comparison Goods Facilities - Droitwich

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	66.0	65.2	0.8	0.0
2025	77.6	78.0	0.9	1.4
2029	85.0	89.4	1.1	5.5
2035	97.4	114.0	1.4	17.9
2041	111.7	135.5	1.6	25.5
Market Share	3.6			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)
2. Assumes constant market share claimed by Droitwich facilities from Study Area

2017 prices

Table 28b: Quantitative Need for Additional Comparison Goods Floorspace - Droitwich

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	1.4	200	400
2029	5.5	800	1,300
2035	17.9	2,300	3,700
2041	25.5	2,900	4,600

Notes:

1. Average sales density assumed to be circa £5,250 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Droitwich
 2. Average sales density assumed to be circa £3,250 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Droitwich
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 29: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN PERSHORE

Table 29a: Estimated 'Capacity' for Comparison Goods Facilities - Pershore

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	23.0	22.7	0.3	0.0
2025	27.1	27.2	0.4	0.5
2029	29.7	31.1	0.5	1.9
2035	34.0	39.7	0.6	6.3
2041	39.0	47.2	0.7	8.9
Market Share	1.2			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)
2. Assumes constant market share claimed by Pershore facilities from Study Area

2017 prices

Table 29b: Quantitative Need for Additional Comparison Goods Floorspace - Pershore

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	0.5	100	100
2029	1.9	300	500
2035	6.3	800	1,400
2041	8.9	1,100	1,800

Notes:

1. Average sales density assumed to be circa £5,000 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Pershore
 2. Average sales density assumed to be circa £3,000 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Pershore
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 30: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN MALVERN

Table 30a: Estimated 'Capacity' for Comparison Goods Facilities - Malvern

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	147.1	144.9	2.2	0.0
2025	173.1	173.5	2.6	3.0
2029	189.5	198.8	3.0	12.2
2035	217.3	253.5	3.8	40.0
2041	249.0	301.3	4.5	56.8
Market Share	8.0			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)
2. Assumes constant market share claimed by Malvern facilities from Study Area

2017 prices

Table 30b: Quantitative Need for Additional Comparison Goods Floorspace - Malvern

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	3.0	500	800
2029	12.2	1,800	2,900
2035	40.0	5,200	8,300
2041	56.8	6,400	10,300

Notes:

1. Average sales density assumed to be circa £5,250 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Malvern
 2. Average sales density assumed to be circa £3,250 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Malvern
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices

SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY



Table 30c: Extant Comparison Goods Commitments, 2019 - Malvern

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Comparison Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Comparison Turnover (£m)
Roman Way, Malvern	16/00051/OUT	2 storey extension to existing retail terrace adjoining Unit 11 (Boots) for uses within Class A1 retail and Class A3 restaurants and cafes.	1,208	1,027	4,000	4.1
TOTAL				1,027		4.1

Notes:

Details provided by South Worcestershire Councils

Net floorspace assumed to be 85% of gross. Assumed all floorspace used for Class A1 comparison goods

Sales density figure derived from information in Mintel Retail Rankings 2018

2017 prices

Table 30d: Net Quantitative Need for Additional Comparison Goods Floorspace - Malvern

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)	
				Min ¹	Max ²
2019	0.0	-	-	-	-
2025	3.0	4.8	-1.8	-	-
2029	12.2	5.3	7.0	1,000	1,700
2035	40.0	6.1	33.9	4,400	7,100
2041	56.8	7.0	49.8	5,600	9,100

Notes:

1. Average sales density assumed to be circa £5,250 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Malvern

2. Average sales density assumed to be circa £3,250 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Malvern

Residual calculated by subtracting turnover of commitments (sourced from Table 30c) from surplus expenditure (sourced from Table 30a)

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 31: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN TENBURY WELLS

Table 31a: Estimated 'Capacity' for Comparison Goods Facilities - Tenbury Wells

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	8.6	8.5	0.2	0.0
2025	10.2	10.1	0.2	0.2
2029	11.1	11.6	0.2	0.7
2035	12.8	14.8	0.3	2.3
2041	14.6	17.6	0.4	3.3
Market Share	0.5			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)
2. Assumes constant market share claimed by Tenbury facilities from Study Area

2017 prices

Table 31b: Quantitative Need for Additional Comparison Goods Floorspace - Tenbury Wells

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	0.2	-	100
2029	0.7	100	200
2035	2.3	300	600
2041	3.3	400	700

Notes:

1. Average sales density assumed to be circa £4,750 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Tenbury Wells
 2. Average sales density assumed to be circa £2,750 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Tenbury Wells
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices



SOUTH WORCESTERSHIRE RETAIL & TOWN CENTRES STUDY, 2019
COMPARISON GOODS CAPACITY

TABLE 32: ESTIMATED CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN UPTON-UPON-SEVERN

Table 32a: Estimated 'Capacity' for Comparison Goods Facilities - Upton-upon-Severn

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2019	3.4	3.4	0.1	0.0
2025	4.1	4.0	0.1	0.1
2029	4.4	4.6	0.1	0.3
2035	5.1	5.9	0.1	0.9
2041	5.8	7.0	0.1	1.3
Market Share	0.2			

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)
2. Assumes constant market share claimed by Upton-upon-Severn facilities from Study Area

2017 prices

Table 32b: Quantitative Need for Additional Comparison Goods Floorspace - Upton-upon-Severn

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2019	0.0	-	-
2025	0.1	-	-
2029	0.3	-	100
2035	0.9	100	200
2041	1.3	200	300

Notes:

1. Average sales density assumed to be circa £4,750 per sq.m (@2019) which WYG considers to be towards the higher end of what could be achieved in Upton
 2. Average sales density assumed to be circa £2,750 per sq.m (@2019) which WYG considers to be towards the lower end of what could be achieved in Upton
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 16 (December 2018)

2017 prices

Appendix I

Commercial Leisure Needs Assessment



1.1 Introduction

- 1.1.1 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how South Worcestershire currently meets the needs of its population in relation to the restaurant and café/coffee shop, health and fitness gym, cinema, ten-pin bowling, and bingo sectors.
- 1.1.2 There can be limitations to survey research, particularly with regard to the sample size which can be achieved and the use of contact by home telephone only. The results should therefore be taken to be a broad indication of consumer preferences.
- 1.1.3 We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in South Worcestershire. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future needs.
- 1.1.4 In considering future commercial leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of the South Worcestershire towns current market shares, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.
- 1.1.5 We have considered the responses from each of the 17 survey zones within our analysis, but necessarily concentrate on the seven towns and cities and their respective survey zones within the South Worcestershire study area. These are:
- Tenbury Wells (Zone 4);
 - Worcester (Zones 6, 7 & 8);
 - Great Malvern (Zones 10 & 11);
 - Upton-upon-Severn (Zone 13);
 - Droitwich (Zone 15);
 - Pershore (Zone 16); and
 - Evesham (Zone 17).



1.1.6 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the need for additional facilities. We assess needs for the next 10 years (to 2029) which is the minimum NPPF need period.

1.2 Participation Leisure Activities

1.2.1 Figure 1.1 examines participation rates for a range of leisure activities (including non-commercial leisure activities) across the towns and city. It is shown that the most popular single activity is to visit restaurants, which an average of 70% of respondents visit across all 17 study zones. This is followed by visits to both cafes/coffee shops and pubs/bars (53%) and visits to the cinema (52% of respondents). Less popular activities include visiting bingo halls, indoor rock-climbing facilities, and nightclubs.

Figure 1.1: Participation in Leisure Activities by City/Town (%)

Activity	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Av.
Restaurant	73%	73%	69%	65%	87%	63%	68%	70%
Café / coffee shop	54%	56%	49%	53%	43%	56%	65%	53%
Gym / health & fitness facility	34%	20%	28%	27%	44%	14%	24%	26%
Cinema	56%	60%	58%	54%	67%	52%	45%	52%
Pub / bar	53%	50%	57%	51%	73%	46%	64%	53%
Nightclub	5%	11%	3%	4%	8%	1%	-	5%
Ten pin bowling	22%	31%	23%	8%	20%	17%	9%	16%
Bingo	3%	2%	1%	1%	-	1%	4%	3%
Theatre / concert hall	50%	38%	41%	47%	34%	35%	39%	42%
Museum / art galleries	32%	21%	30%	25%	17%	31%	34%	27%
Trampolining	8%	15%	11%	6%	13%	1%	5%	8%
Indoor rock climbing	10%	1%	2%	4%	8%	4%	1%	5%
Other Leisure Activity	3%	3%	-	3%	3%	1%	7%	4%
(None of these)	4%	11%	7%	11%	2%	12%	6%	9%

Source: Question 18 of the NEMS Household Survey

1.2.2 In general, responses show that a higher proportion of those in Pershore participate in leisure activities than those in the other towns in South Worcestershire. Respondents in Pershore indicated above average participation rates for 7 out of the 12 mentioned activities and also the smallest proportion of those who said they did not undertake any of the mentioned activities (2%).





- 1.2.3 Tenbury Wells has the highest proportion of respondents who indicate that they do not take part in any mentioned leisure activity (12%) and in 8 of the 12 mentioned activities, those in Tenbury Wells had below average participation rates. As Tenbury Wells is a small town in a relatively isolated location, this may be expected as residents will not necessarily have access to as many leisure facilities as those in larger, or less isolated locations.
- 1.2.4 When respondents were asked what additional leisure facilities they would like to see more of in their area, a new bowling alley was the most common answer across all survey zones (7% of all responses). Other popular answers were a cinema (6%) and then more facilities for children and for youths/teenagers (both 5%).
- 1.2.5 Responses in the different towns varied. A bowling alley was the most sought-after additional facility in Evesham (36% of responses), and in Droitwich both a bowling alley and a cinema were the most popular answers (11%). In Upton-upon-Severn, the most popular answer was a swimming pool (12% of responses).
- 1.2.6 It is interesting to note that over 60% of respondents in each town and city, with the exception of Evesham, indicated that they would not like to see any more of the mentioned leisure facilities. This suggests that a large proportion of residents are generally satisfied with the current leisure provision available.



Figure 1.2: Leisure Facilities that respondents would like to see more of, by zone

Activity	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Total
Restaurants & Cafes	-	6%	2%	2%	1%	3%	5%	2%
Health & Fitness (gym)	>1%	-	-	-	1%	2%	3%	1%
Cinema	1%	1%	11%	>1%	4%	1%	1%	6%
Bowling alley	0%	36%	11%	>1%	4%	1%	3%	7%
Bingo	-	-	-	-	-	-	-	-
Museum / art galleries	1%	-	-	>1%	-	-	-	>1%
Theatre	0%	-	1%	1%	1%	-	-	1%
Other								
Ice Rink	5%	5%	4%	>1%	1%	>1%	>1%	3%
More Facilities/Activities for children	3%	5%	3%	5%	0%	4%	3%	5%
More Facilities/activities for teenagers	2%	5%	5%	4%	2%	3%	2%	5%
More outdoor sports facilities	4%	>1%	1%	4%	1%	4%	3%	4%
Swimming Pool	4%	2%	2%	8%	1%	2%	12%	4%
(None)	65%	41%	61%	73%	77%	75%	65%	61%

Source: NEMS Household Survey

Notes: Multiple responses will mean that figures do not add up to 100%

1.3 Restaurant & Cafés/Coffee Shops

1.3.1 Figure 1.3 summarises the proportion of restaurant trips directed to the most popular destinations inside and outside South Worcestershire based upon the results of the household survey. It identifies that 55% of visits made by residents across the study area are to restaurants within South Worcestershire. Worcester City Centre attracts the greatest proportion of these (26% of all trips), followed by Evesham Town Centre and Great Malvern Town Centre (7% and 6% respectively). Bromsgrove and Kidderminster Town Centres are the most popular destinations for restaurant trips outside of South Worcestershire with each attracting 7% of all trips from the survey area.

1.3.2 19% of all trips from across the survey area are collectively made to restaurants in 'other destinations' outside of South Worcestershire. Although a relatively high proportion together, individually none of these destinations attract more than 1% of trips. Tenbury Wells has the highest proportion of trips made to these 'other destinations' (32%), with 17% of trips made to Ludlow and 6% to Leominster Town Centre. From Great Malvern, 25% of trips go to other destinations, 5% are made to London but no other destination attracts more than 2% of trips.



Figure 1.3: Study Area Market Share for Restaurant Visits

Centre	Worcester	Eveshamr	Droitwich	Great Malvern	Pershore	Tenbury wells	Upton upon Severn	Study Area Total
Inside South Worcestershire	90%	77%	87%	70%	80%	59%	54%	55%
Worcester City Centre	67%	2%	42%	27%	35%	11%	5%	26%
Evesham Town Centre	>1%	56%	-	-	12%	-	-	7%
Droitwich Town Centre	1%	-	35%	-	-	-	4%	2%
Great Malvern Town Centre	3%	-	-	30%	-	1%	15%	6%
Pershore Town Centre	1%	1%	-	-	24%	-	-	2%
Tenbury Wells Town Centre	>1%	-	-	>1%	-	44%	-	1%
Upton-upon-Severn Town Centre	-	-	1%	-	-	-	16%	>1%
Other Destinations	19%	17%	9%	13%	9%	2%	14%	12%
Outside South Worcestershire	10%	23%	13%	30%	20%	41%	46%	45%
Bewdley Town Centre	-	-	-	-	-	6%	-	2%
Birmingham City Centre	2%	-	-	>1%	-	2%	2%	2%
Bromsgrove Town Centre	-	-	5%	-	-	-	1%	7%
Cheltenham Town Centre	1%	14%	-	2%	7%	1%	4%	3%
Kidderminster Town Centre	-	-	-	1%	-	-	-	7%
Tewkesbury Town Centre	1%	-	-	2%	-	-	22%	3%
Other Destinations	6%	9%	8%	25%	13%	32%	17%	19%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

1.3.3 Figure 1.3 shows:

- Worcester City Centre - retains 67% of the restaurant market share from those living with the city and immediate surroundings (Zones 6,7 & 8) and it also captures 42% of the market share from Droitwich, 35% from Pershore, 31% from Zone 5 (Rural North West of South Worcestershire) and 27% from Great Malvern and surroundings. Worcester's influence also extends beyond the study area, attracting 12% of trips from Zone 1 (West of Stourport-on-Severn) and 10% of trips from Zone 12 (Ledbury). The recent Cathedral Square redevelopment has significantly improved the restaurant offer within the City Centre with 8 additional units provided, and the influence of Worcester across the study area shows the city is clearly an attractive destination. There does not appear to be a deficiency in restaurant provision as we note that the unit formerly earmarked for Byron Burger at Cathedral Square has remained vacant since it was refurbished in September 2017, and there is also an unlet restaurant unit located on the 1st floor.
- Evesham Town Centre – retains 56% of the market share from its study zone and attracts 12% of trips made from Pershore. To a lesser extent, the Town Centre also has an





influence on those in Zone 14 (Tewkesbury) (1% of trips) and a small number of trips are made from Worcester (less than 1%). For the size of the town, we consider the restaurant provision within Evesham to be adequate. Following any forthcoming redevelopment of the Riverside Shopping Centre, we would expect that the restaurant market share captured by the town centre will increase.

- Droitwich Town Centre – attracts 35% of restaurant trips from those within its zone. It also attracts 4% of trips from Upton-upon-Severn and 1% from Worcester. The retention levels and influence of restaurant facilities in Droitwich is low for the size of the town, however this reflects the close proximity of Worcester which has a significantly larger restaurant offer.
- Great Malvern Town Centre – 30% of the trips made from Great Malvern and its surroundings (Zones 10 and 11) are made to restaurants within the Town Centre. Great Malvern also has an influence on other surrounding areas, drawing 15% of trips from Upton-upon-Severn and its zone, and 11% of trips from Zone 12 (Ledbury). Given that Great Malvern mainly caters to the visitor/tourist market, the restaurant provision and influence of facilities in Great Malvern is considered to be generally good and reflective of the size of the Town Centre.
- Pershore Town Centre – retains 24% of restaurant trips made from its study zone and attracts 1% of trips each from Evesham and Worcester. Pershore is a relatively small town and is close to Worcester, Evesham and to Cheltenham. Because of this, we consider the market share and retention levels captured by the town centre to be as expected.
- Tenbury Wells Town Centre – retains 44% of the restaurant market share from its Zone. The Town Centre also attracts 3% each of trips from Zones 1 (West of Stourport on Severn) and 9 (Bromyard). This is reflective of the small size of the town centre and its rural location.
- Upton-upon-Severn Town Centre – attracts the lowest proportion of trips from across the study area (less than 1%), and 16% from its survey zone (Zone 13). Despite these figures appearing low, they are to be expected and are not necessarily reflective of any material deficiency within the Town Centre. The town is geared towards the tourist/visitor market and its small size, rurality and location at the edge of its survey zone mean other destinations including the nearby Tewkesbury attract a greater number of restaurant visits.



1.3.4 Turning to cafes and coffee shops, Figure 1.4 shows that 56% of all trips from the study area are made to cafes and coffee shops within South Worcestershire. As with restaurants, Worcester captures the biggest market share of the café and coffee shop market, attracting 26% of all trips made.

Figure 1.4: Study Area Market Share for Cafe Visits

Centre	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Total
Inside South Worcestershire	97%	84%	93%	83%	92%	79%	49%	56%
Worcester City Centre	77%	4%	21%	26%	30%	6%	14%	26%
Evesham Town Centre	>1%	75%	-	-	13%	-	1%	9%
Droitwich Town Centre	>1%	-	68%	-	-	1%	-	5%
Great Malvern Town Centre	2%	-	-	36%	-	2%	13%	5%
Pershore Town Centre	>1%	2%	1%	-	40%	-	-	2%
Tenbury Wells Town Centre	-	-	-	-	-	65%	-	1%
Upton-upon-Severn Town Centre	-	-	-	-	-	-	16%	>1%
Other Destinations	16%	3%	3%	21%	8%	4%	5%	8%
Outside South Worcestershire	3%	15%	7%	17%	8%	21%	51%	44%
Bewdley Town Centre	-	-	-	-	-	-	-	2%
Birmingham City Centre	-	-	-	-	-	-	-	3%
Bromsgrove Town Centre	-	-	3%	-	-	-	-	8%
Cheltenham Town Centre	-	10%	-	1%	2%	1%	5%	2%
Kidderminster Town Centre	-	-	-	1%	-	11%	-	9%
Tewkesbury Town Centre	-	-	-	-	-	-	35%	5%
Other Destinations	3%	5%	3%	15%	7%	9%	11%	15%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

1.3.5 Figure 1.4 also shows that:

- Worcester City Centre – retains 77% of the café/coffee shop market share from those in the city. The City Centre also draws from the surrounding area and attracts 30% of trips from Pershore, 26% from Great Malvern and 21% from Droitwich. 63% of all trips made from Zone 5 (Rural North West of South Worcestershire) and 16% of trips from Zone 9 (Bromyard) are also made to the city. As the largest centre in South Worcestershire the influence of facilities within the City Centre are to be expected, and overall, we consider the café/coffee shop provision to be generally good.





- Evesham Town Centre – attracts 13% of trips from Pershore, 1% from Upton-upon-Severn and a limited number of trips from Worcester (>1%). The Town Centre retains 75% of the market share from those within its survey zone suggesting that the café and coffee provision in Evesham meets the needs of its population.
- Droitwich Town Centre – mainly attracts visitors to its cafes from within its survey zone, retaining 68% of all trips. Cafes in the town centre also attract a small proportion of visitors from Tenbury Wells (1%) and from Worcester (>1%). Considering the size and function of Droitwich town centre, the café and coffee shop provision is assessed to be good.
- Great Malvern Town Centre – attracts trips from across the survey area including 13% from Upton-upon-Severn in the adjacent zone, 2% of trips from Tenbury wells, 2% from Worcester, and 1% from Zone 5 (Rural North West of South Worcestershire). The town centre attracts only 38% of visits from those within its survey zones (10 & 11) and this is clearly affected by the proximity of Malvern Shopping Park on Roman Way, which attracts 14% of trips from these zones.
- Pershore Town Centre – retains 40% of café trips from its surrounding survey zone (Zone 16). The Town Centre also attracts 1% of trips from Droitwich, and 2% from Evesham. We do not identify any deficiency in café/coffee shop provision in Pershore, and considering the proximity of the town to Evesham and Worcester, the retention levels are reasonably good.
- Tenbury Wells Town Centre – retains 65% of the café market share from its zone (Zone 4) and attracts 6% of trips from Zone 1 (West of Stourport on Severn), which lies outside of South Worcestershire. Overall, we consider the retention levels to be very good. They reflect the town's rural location and its relative isolation in the north west of South Worcestershire, away from major settlements.
- Upton-upon-Severn Town Centre – as with restaurant visits, the town attracts the lowest proportion of trips to cafes and coffee shops from across the study area at less than 1%. 16% of trips from its survey zone (Zone 13) are made to cafes and coffee shops in the town, with a large proportion (35%) being made to nearby Tewkesbury. Again, these figures do not necessarily reflect any material deficiency within the Town Centre, more its small size, role, and proximity to other locations such as Tewkesbury to the south, and Worcester and Great Malvern to the north east and north west.



1.4 Health and Fitness

- 1.4.1 As identified in Figure 1.1, the household survey indicates that 26% of respondents in the Study Area visit indoor health and fitness facilities. Of the participating respondents, the main destinations mentioned are summarised in Figure 1.5.
- 1.4.2 Health and Fitness facilities in South Worcestershire attract 64% of indoor health and fitness trips from within the study area. Apart from Upton-upon-Severn, where 46% of trips are made to facilities outside of South Worcestershire, over 85% of trips from each of the other towns and city are retained within the study area boundary, spread between the main settlements.

Figure 1.5: Study Area Market Share for Indoor Health & Fitness by Zone

Centre	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Total
Inside South Worcestershire	97%	97%	95%	97%	94%	88%	54%	64%
Worcester	90%	-	13%	25%	8%	6%	24%	31%
Evesham	-	97%	-	-	29%	-	-	9%
Droitwich	-	-	77%	1%	2%	-	-	6%
Great Malvern	3%	-	-	69%	-	-	24%	10%
Pershore	3%	-	-	-	54%	-	3%	6%
Tenbury Wells	-	-	-	-	-	81%	-	1%
Upton-upon-Severn	-	-	-	-	-	-	3%	>1%
Other Destinations	1%	-	5%	1%	3%	-	-	1%
Outside South Worcestershire	3%	3%	5%	3%	6%	13%	46%	36%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

- 1.4.3 Worcester is shown to attract 31% of all trips to health & fitness facilities made from the study zones. The city retains 90% of the market share from its study zones (Zones 6, 7 & 8), but also attracts a large proportion of trips from those in Great Malvern and Upton-upon-Severn and Zone 5 (Rural North West South Worcestershire).
- 1.4.4 Evesham retains 97% of trips from residents of the town and it also has an influence on Pershore, attracting 29% of trips. Great Malvern is the only other town which attracts a notable number of trips from elsewhere, capturing 24% of the trips from Upton-upon-Severn, 10% of trips from Zone 5, and 3% of trips from Worcester. With the exception of Upton-upon-Severn, which doesn't provide any health and fitness facilities, the retention rates across the other centres in South Worcestershire are considered to be good.



- 1.4.5 Outside of South Worcestershire the most popular destinations for indoor health and fitness facilities is Bromsgrove Town Centre which attracts 10% of the total number of trips, all from its own survey zone (Zone 3). Other popular destinations include Kidderminster, which attracts trips from Zones 1, 2 and 5 (West of Stourport on Severn, Kidderminster, and Rural North West of South Worcestershire), and Tewkesbury, which attracts 40% of the trips from the nearby Upton-upon-Severn, and 70% of trips from its own zone (Zone 14).
- 1.4.6 In terms of improvements to health & fitness facilities in South Worcestershire, 1% of all respondents across the survey areas suggested that that they would like to see more health & fitness facilities in their area which indicates that respondents are generally satisfied with the current provision. However, we note from the 'Requirements List' that gym operators are seeking floorspace in Worcester.
- 1.4.7 Having regard to the projected increase in population in South Worcestershire, there is likely to be a quantitative need for new health and fitness gym facilities in the next 10 years. We have sought to quantify this likely requirement based on current rates of participation in Figure 1.6 below. In considering the requirements set out, it should be noted that a new modern conveniently located indoor health and fitness facility is likely to result in some new gym members and in turn an uplift in participation rates.

Figure 1.6: Health and Fitness Gym Requirement in South Worcestershire (2019-2029)

	Study Area Population Increase	Typical Population Required to Support New Gym	Study Area Custom Claimed	Potential No. of New Gyms Supported
South Worcestershire	27,857	2,800 - 3,500	64%	6.4 – 7.9
Worcester	27,857	2,800 - 3,500	31%	2.5 – 3.1
Evesham			9%	0.7 – 0.9
Droitwich			6%	0.5 – 0.6
Great Malvern			10%	0.8 - 1
Pershore			6%	0.5 – 0.6

Note: Typical population required to support new gym sourced from information published by gym operators (including company account reports/accounts)

- 1.4.8 The increase in population anticipated in the Study Area in the period to 2029 is anticipated to be 27,857. Applying the market share for indoor health and fitness gym facilities in South Worcestershire (64%) this identifies potential for 17,828 new gym members within this area. Information published by a number of health and fitness operators identify that typical/average members per health and fitness gym facility ranges from 2,800 to 3,500 members. Based on the





typical/average members per health and fitness facility, there could be a requirement for between 6 and 8 health and fitness gyms across South Worcestershire.

- 1.4.9 Figure 1.6 also calculates the requirement for new gym facilities in each town. Given the size of both Tenbury Wells and Upton-upon-Severn and the fact that each town attracts less than 1% of total number of gym trips from the study area we do not consider that there is a need to plan for new gym facilities in either town. Tenbury Leisure Centre is considered to meet the needs of Tenbury residents whilst nearby facilities in Worcester, Malvern and Tewkesbury meet the needs of residents of Upton-upon-Severn.
- 1.4.10 It is shown that based on current participation rates, there could be a requirement of between 2 and 3 new gym facilities in Worcester over the next 10 years. This is broadly consistent with the identified requirements from 2 operators seeking new premises in the City Centre as shown in 'The Requirements List'. Despite this stated potential requirement, we do not consider there to be a material deficiency in gym provision within the city at this time Existing facilities in the City Centre include Fitness4Less in Cathedral Square and PureGym in St Martin's Gate, while there are a number of other facilities elsewhere in the city including facilities at the university, a David Lloyd gym off Warriors Way in North Worcester; Perdiswell Leisure Centre; a Nuffield Health & Fitness Centre and numerous other small operators.
- 1.4.11 In terms of Evesham and Great Malvern, there is a potentially a requirement for 1 health and fitness gym in each town in the next 10 years. It is noted that there are currently no requirements from gym operators to open new premises in these towns and this is potentially reflective of the fact that the requirements are marginal. There are already a number of facilities in each town including Evesham Leisure Centre, One on One Fitness and Utopia Gym in Evesham, and Malvern Splash Leisure Complex, facilities at the Malvern Spa Hotel and the Clarence Park Health Suite in Malvern.
- 1.4.12 Turning to Droitwich and Pershore Figure 1.6 indicates, based on current participation levels, that there is unlikely to be a requirement for a new gym facility in the next 10 years in either town. Existing gym facilities in Droitwich include Droitwich Spa Leisure Centre, Anytime Fitness, Pure Gym and Spa Fitness, while Pershore Leisure Centre serves Pershore. These existing facilities are assessed to adequately serve each town.



1.4.13 Overall, whilst a low proportion of respondents to the survey wanted to see a new gym facility in their local area (see Fig. 1.2), the forecast and outstanding operator requirements indicate that Worcester City Centre could potentially accommodate 1-2 additional health & fitness facilities over the next 10 years. It is also calculated that Evesham and Malvern may also have a need for a new facility in each town centre over the next decade although there are no current operator requirements, so this need is considered marginal.

1.5 Cinemas

1.5.1 The cinema provision in South Worcestershire is split between large-scale multi-screen operators in Worcester, and smaller scale locally run facilities in each of the other towns. As shown in Figure 1.2, 6% of respondents across the survey zones said that they would like to see more cinemas which indicates a general level of satisfaction with the existing facilities. The existing cinemas in South Worcestershire are as follows:

- Vue, Friar Street, Worcester (6 screens) – Located within the designated City Centre Boundary, this cinema complex provides a total of 1,315 seats. Films are shown at various times throughout the day, seven days a week.
- Odeon, Foregate Street, Worcester (7 screens) – This cinema is located just outside of the City Centre Boundary to the north. Accommodating a total of 1,016 screens, the cinema operates 7-days a week.
- Regal Cinema, Evesham (1 screen) – Located just outside of the Town Centre boundary on Port Street, this facility also hosts art events, lectures, live music and other live performances.
- Norbury Theatre & Cinema, Droitwich (1 screen) – The Norbury is a volunteer-run theatre and cinema located just outside the Town Centre boundary on Friar Street. Showing classic films, musicals and live theatre performances, the facility is also available for private hire.
- Malvern Theatre & Cinema, Grange Road (1 screen) – Forming part of the larger theatre complex, this 302-seat cinema shows a mix of classic films and the latest releases.
- Number 8 Arts Centre, High Street, Pershore (1 screen) – This venue provides a 250-seat auditorium which hosts regular film screenings as well as live theatre and dance performances.





- Regal Cinema, Teme Street, Tenbury Wells (1 screen) – This cinema is located on the main shopping street in the Town Centre and has a capacity of approximately 300 seats. The venue provides regular film screenings in addition to music performances and theatre shows.
- Memorial Hall, Upton-upon-Severn (1 screen) – A multi-purpose venue run The Town Council, the Memorial Hall occasionally screens films put on by 'Arts Alive' and 'Flicks in the Sticks' who promote the arts in rural areas of Worcestershire, Shropshire and Herefordshire.

1.5.2 As shown in Figure 1.7, 51% of cinema trips across the study zones are made to facilities within South Worcestershire. The cinemas in Worcester capture 40% of the total number of trips and they are shown to have an influence across the other towns in South Worcestershire. This is especially apparent in Droitwich and Pershore, where 47% and 48% of the market share is captured by the cinemas in Worcester respectively.

1.5.3 The Regal Cinema in Evesham and The Malvern Theatre & Cinema together capture 14% of the market share across the study zones. The Regal Cinema retains 42% of the cinema trips in Evesham and captures 16% of trips from Pershore, 4% from Tenbury Wells, and 2% from Worcester. The cinema in Great Malvern retains 49% of the trips made from Malvern and attracts 15% of trips from Upton-upon-Severn.

1.5.4 In terms of the influence of cinemas outside of South Worcestershire, the Empire Cinema in Rubery, Birmingham attracts the highest number of trips. This large multiplex cinema complex captures 16% of the market share from across the study zones with particular influence on Droitwich's study zone, where 27% of all trips are made to the facility. The Cineworld complex in Cheltenham also has a significant influence across the study area capturing 42% of trips from Evesham, 16% from Upton-upon-Severn and 10% from Pershore.



Figure 1.7: Study Area Market Share for Cinema Visits

Centre	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Total
Inside South Worcestershire	98%	51%	60%	87%	86%	82%	57%	57%
Worcester	93%	8%	47%	37%	48%	6%	36%	40%
Evesham	2%	42%	-	-	16%	4%	-	7%
Droitwich	-	-	12%	-	-	-	-	1%
Great Malvern	2%	-	1%	49%	-	-	15%	7%
Pershore	-	-	-	1%	22%	-	4%	2%
Tenbury Wells	-	1%	-	-	-	71%	-	2%
Upton-upon-Severn	-	-	-	-	-	-	2%	>1%
Outside South Worcestershire	2%	49%	40%	13%	14%	18%	43%	43%
Empire Cinema, Rubery	-	-	27%	-	-	-	-	16%
Cineworld, NEC, Birmingham	-	-	-	-	1%	-	-	1%
Odeon, Merry Hill	-	-	-	-	-	3%	-	4%
Odeon, New St, Birmingham	-	-	-	2%	1%	-	-	1%
Vue, Watson Rd, Birmingham	-	-	13%	-	-	-	-	1%
Cineworld, The Brewery, Cheltenham	-	42%	-	1%	10%	-	16%	8%
Odeon, The Old Market, Hereford	-	-	-	7%	-	9%	-	2%
Reel Cinema, Kidderminster	-	-	-	-	1%	3%	-	2%
Roses Theatre & Cinema, Tewkesbury	-	-	-	-	-	-	16%	2%
Vue, Kingfisher Centre, Redditch	-	-	1%	-	-	-	-	2%
Other destinations	2%	8%	-	4%	1%	3%	12%	4%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

- 1.5.5 Mintel estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions. Applying these benchmark averages to the Study Area, we estimate that there will be 1,450,856 cinema admissions arising from the population at 2019, increasing to 1,526,069 admissions by 2029. Based on the assumed number of visits per screen, we calculate that around 33.8 screens can be supported in the Study Area at 2019, increasing slightly to 35.6 screens at 2041. Our calculations are set out in Figure 1.8 below.



Figure 1.8: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2019	537,354	2.7	1,450,856	42,927	33.8
2025	554,566	2.7	1,497,328	42,927	34.9
2029	565,211	2.7	1,526,069	42,927	35.6

- 1.5.6 As shown in Figure 1.9 below, based on the current market share, around 19.3 cinema screens could currently be supported in South Worcestershire, increasing to around 20.3 screens at 2029. Although there are 19 cinema screens provided across South Worcestershire, facilities in Evesham, Droitwich, Pershore and Upton-upon-Severn are also used for other activities (e.g. theatre and music performances) meaning that the provision is diluted somewhat. The calculated cinema screen requirement shown above suggests therefore, that there may be capacity for an additional small cinema facility in the study area.

Figure 1.9: Cinema Screen Requirement in South Worcestershire

Year	Screens Supported	Study Area Custom Claimed by South Worcestershire	No. of Screens Supported in South Worcestershire
2019	33.8	57%	19.3
2025	34.9	57%	19.9
2029	35.6	57%	20.3

- 1.5.7 In terms of reviewing cinema requirements on a town by town basis, having regard to their size and existing cinema provision, we do not consider there is a need to plan for additional cinema facilities in Great Malvern, Pershore, Tenbury Wells and Upton-upon-Severn town centres. In the unlikely event that any planning application should come forward for a cinema facility in these towns we consider they should be such development are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.
- 1.5.8 We calculate the indicative cinema screen requirements for each Worcester, Evesham and Droitwich in Figure 1.10 below.



Figure 1.10: Cinema Screen Requirement in Worcester

	Year	Screens Supported in South Worcestershire	Study Area Custom Claimed	No. of Screens Supported
Worcester	2019	33.8	40%	13.5
	2025	34.9		14.0
	2029	35.6		14.2
Evesham	2019	33.8	7%	2.4
	2025	34.9		2.4
	2029	35.6		2.5
Droitwich	2019	33.8	1%	0.3
	2025	34.9		0.3
	2029	35.6		0.4

- 1.5.9 Figure 1.10 indicates that Worcester could theoretically support 14.2 screens by 2029. This requirement broadly supports the 13 screens currently provided across the two existing cinema facilities in the town. Having regard to the existing cinema provision we do not consider that there is a need to plan for any additional cinema facilities in Worcester in the next 10 years.
- 1.5.10 In terms of Droitwich, based on existing market shares, there is no identified additional screen requirements. Whilst we note that 11% of respondents within the town indicated that they would like see more cinema provision in Droitwich, having regard to the existing Norbury Theatre and Cinema and the location and attraction of cinema provision in Worcester we do not consider that there is need to plan for, or demand to support, additional cinema provision in Droitwich for the next 10 years.
- 1.5.11 Finally, turning to Evesham, Figure 1.10 shows that an additional 1-2 cinema screens may be supported in the town in by 2029. This calculation is supported by responses to the household survey which indicate that 58% of cinema trips from the town are made to destinations outside of Evesham (including 42% to Cheltenham). Should proposals come forward for the redevelopment of the Riverside Shopping Centre, we consider that a small to medium sized cinema in this location could enhance the leisure offer within the town centre and help to retain some of the market which is currently lost to facilities in Cheltenham.
- 1.5.12 Overall, we consider that the cinema provision within South Worcestershire largely meets the needs of the current population with cinema facilities in each of the Town Centres and 2 large cinemas in Worcester City Centre. By 2029 however, our calculations suggest that there may be capacity for an additional small cinema facility in South Worcestershire and we consider Evesham Town Centre to be the most appropriate location for any additional facilities.



1.6 Tenpin Bowling

- 1.6.1 There are currently 2 ten-pin bowling facilities in South Worcestershire, both in Worcester. MFA Bowl is located in St John's, to the west of the City Centre, and Tenpin Worcester is located in the north of the city at Perdiswell Park.
- 1.6.2 Figure 1.11 shows that the two ten-pin bowling facilities in Worcester attract 54% of trips to bowling facilities from the study area. Between 90% and 97% of all trips from Droitwich, Great Malvern and Worcester are captured by these facilities, with around 50% of trips attracted from Upton-upon-Severn and 65% from Pershore. A lower proportion of trips are attracted from Evesham and Tenbury Wells.

Figure 1.11: Study Area Market Share for Tenpin Bowling Visits

Centre	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Total
Inside South Worcestershire	94%	20%	90%	97%	68%	17%	48%	54%
TenPin Worcester, Perdiswell Park	42%	8%	65%	26%	13%	11%	8%	27%
MFA Bowl, St John's, Worcester	52%	12%	25%	71%	55%	6%	40%	28%
Outside South Worcestershire	6%	80%	10%	3%	32%	83%	52%	46%
Hollywood Bowl, Great Park, Rubery	-	-	10%	-	-	6%	-	13%
Hollywood Bowl, Cheltenham	-	80%	-	-	32%	-	28%	21%
Avatar Bowling, Kidderminster	-	-	-	-	-	-	-	6%
Hollywood Bowl, Birmingham City	6%	-	-	3%	-	-	-	2%
Grove Golf and Bowl, Leominster	-	-	-	-	-	78%	-	2%
Tenpin Gloucester	-	-	-	-	-	-	16%	>1%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

- 1.6.3 Across the study zones 46% of trips are made to facilities outside South Worcestershire. Of these, Hollywood Bowl in Cheltenham captures 21%, and Hollywood Bowl in Rubery, Birmingham attracts 13% of all trips.
- 1.6.4 Overall, we consider ten-pin bowling provision in Worcester to adequately meet the requirements of the population of South Worcestershire. However, we note that 80% of bowling visits from Evesham take place at the Hollywood Bowl in Cheltenham. As shown in Figure 1.2, 36% of respondents in Evesham indicated that they would like an additional bowling facility in the town. Given this, there could be potential for Evesham to accommodate a small indoor bowling facility. However, at the current time, there are no requirements from tenpin bowling operators to open a



new facility in the town (or even in South Worcestershire). We recommend therefore, that should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

1.7 Bingo

- 1.7.1 There are currently 2 permanent bingo halls in South Worcestershire, both are located in Worcester. Gala Bingo is located just north of the City Centre boundary on Foregate Street and Majestic Bingo is located in the Brickfields area of the city, off Derwent Close. Responses to the household survey indicate that additional bingo activities take place in several other locations within the study area, mainly within village halls in rural areas.
- 1.7.2 The household survey indicates that visiting bingo halls is undertaken by only 3% of respondents to the survey. Figure 1.12 shows that facilities in South Worcestershire attract 40% all trips from the survey zones, and destinations outside of this area capture 60% of trips. Buzz Bingo in Rubery, Birmingham is the most popular destination overall, attracting 19% of all trips. It is worth noting that these trips originate from Zone 3 (Bromsgrove), the majority of which falls outside of the study area boundaries. No trips are made to this facility from Worcester or any of the other towns in South Worcestershire. Of the destinations inside South Worcestershire, Gala Bingo on Foregate St, Worcester is the most popular and attracts 18% of all trips.

Figure 1.12: Study Area Market Share for Bingo Visits

Centre	Worcester	Evesham	Droitwich	Great Malvern	Tenbury Wells	Pershore	Upton upon Severn	Study Area Total
Inside South Worcestershire	56%	79%	-	50%	100%	-	85%	40%
Gala Bingo, Foregate St, Worcester	11%	79%	-	25%	-	-	55%	18%
Majestic Bingo, Derwent Close,	45%	-	-	25%	100%	-		17%
Other Destinations	-	-	-	-	-	-	30%	5%
Outside South Worcestershire	44%	21%	100%	50%			15%	60%
Buzz Bingo, Rubery, Birmingham	-	-	-	-	-	-	-	19%
Shipleys Bingo, New Rd,	44%	-	-	-	-	-	-	18%
Mecca Bingo, Oldbury	-	-	100%	-	-	-	-	2%
Other Destinations	-	21%	-	50%	-	-	15%	21%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

- 1.7.3 Mintel identify that there were 354 bingo halls in the UK in 2016, which against the 2016 population of the UK of 65.1 million, suggests that each is supported by a catchment of 183,898



persons or thereabouts. Given that each study zone supports a population significantly less than this, we have reviewed the requirements South Worcestershire as a whole.

- 1.7.4 South Worcestershire has a total estimated population of 537,354 at 2019, increasing to 565,211 at 2025. Given a market share of 40%, we estimate that the South Worcestershire population could theoretically support 1.2 bingo clubs at 2019, remaining at the same level in 2029. Accordingly, having regard to the existing two large bingo halls in Worcester we do not consider there will be a requirement for an additional bingo facility in South Worcestershire.

Figure 1.13: Bingo Hall Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported by Study Area	Study Area Custom Claimed by South Worcestershire	Potential No. of Halls Supported in South Worcestershire
2019	537,354	183,898	2.9	40%	1.2
2025	554,566	183,898	3	40%	1.2
2029	565,211	183,898	3.1	40%	1.2

- 1.7.5 Accordingly, at the current time there is no demonstrable need to improve competition and choice in bingo halls in South Worcestershire, although this will be subject to market demand from other bingo operators. Given that current trends for bingo halls show activity moving online instead of physical venues, future demand for new venues is expected to be very limited. We recommend that, if demand arises in the future, proposals for such development are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

1.8 Arts and Cultural Facilities

- 1.8.1 Arts and cultural activities play an important role in providing a distinct identity to places or towns, as well as being an important contributor to the local economy. Research by the Centre for Economic and Business Research (CEBR) in 2019 has quantified that every pound of GVA generated by the arts and culture industry, an additional £1.24 of GVA is generated in the wider economy through wider indirect and induced multiplier impacts of the industry. CEBR identify that the arts and culture sector was estimated to have produced a turnover of £48 billion and was the responsible for the employment of approximately 363,713 people in the UK in 2016.
- 1.8.2 For the purpose of this assessment, consideration is given to the provision of theatres and museum/art facilities within South Worcestershire. Figure 1.14 details the main cultural venues in South Worcestershire. It is important to note also that the towns and cities themselves are



important attractors in themselves, with facilities such as churches, cathedrals and sporting venues which add to the overall appeal of the towns/cities to visitors.

Figure 1.14: Main Cultural Venues in South Worcestershire

Museums	Theatres
Worcester: • Museum & Art Gallery Foregate Street, • The Commandery Sidbury, • Royal Worcester Porcelain, Severn Street • Tudor House, Friar Street • University Hospital Museum • The Greyfriars, Friar Street • Mercian Regiment Museum Evesham: • The Almonry Heritage Centre Droitwich • Droitwich Heritage Centre Great Malvern: • Malvern Museum Tenbury Wells: • Tenbury Museum Upton-upon-Severn: • Tudor House Museum and Upton Heritage Centre Other Locations: • Elgar's Birthplace, Lower Broadheath	Worcester: • Huntingdon Hall • Henry Sandon Hall • Swan Theatre • John Moore Theatre • Spires Theatre Evesham: • The Arts Centre Droitwich: • Norbury Theatre Great Malvern: • Malvern Theatre Complex • Theatre of Small Convenience Pershore: • Number 8 Arts Centre Tenbury Wells: • The Regal

- 1.8.3 The results of the household survey indicate that 27% of respondents from across the survey area visit museums and galleries. Theatres are even more popular with some 42% of respondents visiting these venues.
- 1.8.4 In terms of trips to undertake art and cultural activities, Figure 1.15 indicates that 42% are made to attractions within South Worcestershire. Great Malvern is the most popular destination attracting 26% of all trips, while Worcester is the second most popular destination with 13% of trips being made to the City.



Figure 1.15: Study Area Market Share for Art/Cultural Activities (Theatres, Galleries & Museums)

Centre	Worcester	Evesham	Droitwich	Great Malvern	Pershore	Tenbury Wells	Upton upon Severn	Study Area Total
Inside South Worcestershire	75%	23%	43%	73%	63%	52%	43%	42%
Worcester	37%	8%	14%	1%	7%	6%	4%	13%
Evesham	1%	7%	-	-	4%	-	>1%	1%
Droitwich	-	-	19%	-	2%	-	-	1%
Great Malvern	36%	8%	10%	71%	21%	8%	38%	26%
Pershore	>1%	>1%	-	1%	29%	-	>1%	1%
Tenbury Wells	-	-	-	>1%	-	38%	-	1%
Upton-upon-Severn	-	-	-	-	-	-	1%	>1%
Outside South Worcestershire	25%	77%	57%	27%	37%	48%	57%	48%
Birmingham City Centre	7%	13%	41%	4%	10%	24%	4%	20%
Central London (incl. West End)	12%	27%	11%	9%	11%	16%	13%	13%
Cheltenham	-	15%	-	3%	3%	-	10%	3%
Stratford-upon-Avon	1%	8%	-	5%	10%	-	1%	3%
Tewkesbury	-	-	-	1%	-	-	11%	2%
Other Destinations	6%	15%	5%	6%	2%	8%	17%	17%

Source: NEMS Household Survey

Notes: Figures may not add due to rounding

- 1.8.5 Destinations in Worcester attract 13% of all trips, retaining 37% of trips from those living in the locality (Zones 6, 7 & 8), and 14% of those from Droitwich (Zone 15). The City also attracts 13% of trips from Zones 1 (West of Stouport-on-Severn) and 7% from Zone 2 (Kidderminster).
- 1.8.6 The popularity of Malvern can be attributed to the town's theatre complex which has a national reputation. The town's cultural facilities have considerable influence across South Worcestershire and attract trips from across region, including 36% of all trips from Worcester, 38% from Upton-upon-Severn and 21% from Pershore.
- 1.8.7 Primarily due to: the type; the limited size; the scale of arts and cultural facilities in the remaining parts of South Worcestershire; their location to existing arts and cultural facilities in Worcester; and the fact that a large proportion of the facilities are primarily targeted for visitors/tourists (which reside outside the study area) such facilities attract a study area market share of less than 1%.
- 1.8.8 Outside of South Worcestershire, attractions in Birmingham are most popular and capture 20% of all trips, while 13% of trips are made to facilities in Central London and the West End. Facilities in



both London and Birmingham attract trips from across the study area. More regionally, other destinations are shown to have an influence on particular areas. Attractions in Cheltenham capture 10% of trips from Upton-upon-Severn, 15% from Evesham and 22% from Zone 14 (Tewkesbury), and those in Stratford-upon-Avon attract 10% of trips from Pershore, 8% from Evesham and 9% from Zone 10 (Rural West of South Worcestershire).

1.8.9 As a major sub-regional centre it is considered that Worcester sustains a good number of cultural facilities. The household survey identifies that facilities in Worcester draw from a large area and the city is a destination in the study area. Furthermore:

- stakeholders consider that the town contains a strong arts and cultural offering provided through, inter alia, theatres and museums;
- additional/improved cultural facilities have not been identified by household survey respondents as a measure that would encourage them to visit Worcester City Centre more frequently; and
- less than 2% of household survey respondents in the study area would like to see more arts and cultural facilities.

1.8.10 Accordingly, we do not consider that there is a current requirement for new cultural facilities in Worcester. However, in order to maintain and improve current participation rates, and help increase the number of visitors to the venues/area, consideration should be given to ways of further promoting existing facilities and improving marketing.

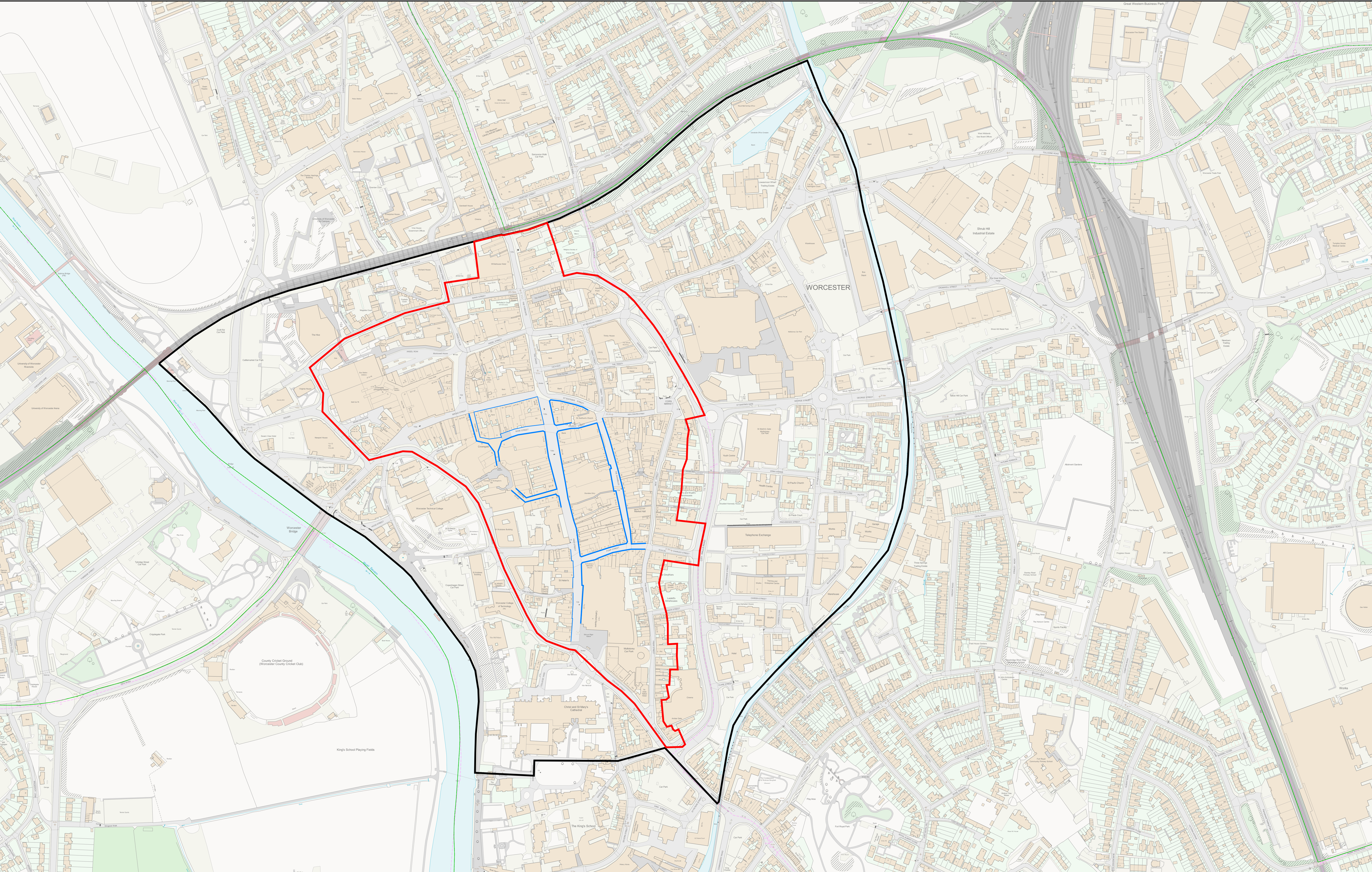
1.8.11 In terms of existing cultural facilities in the other towns in South Worcestershire, we consider existing provision in the towns is of a scale which is appropriate to their role in the hierarchy. Demand/need for additional provision is likely to be limited due to the location of existing more comprehensive cultural facilities in the sub-regional centre of Worcester.

1.8.12 We again recommend that, should any proposals for arts and cultural development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

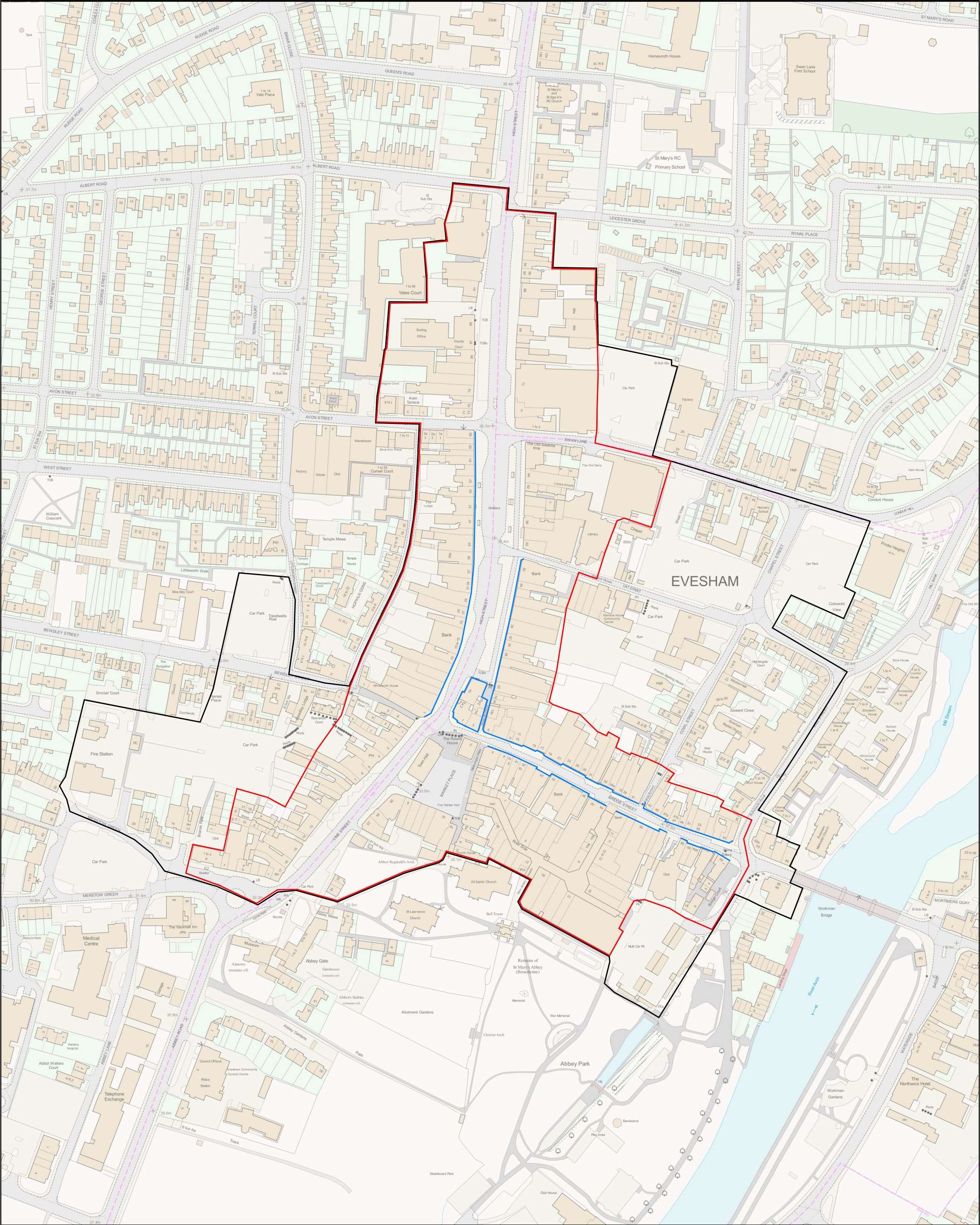


Appendix J

Recommended Town Centre Boundaries, Primary Shopping Areas and Primary Shopping Frontages



Evesham Town Centre, OS Map



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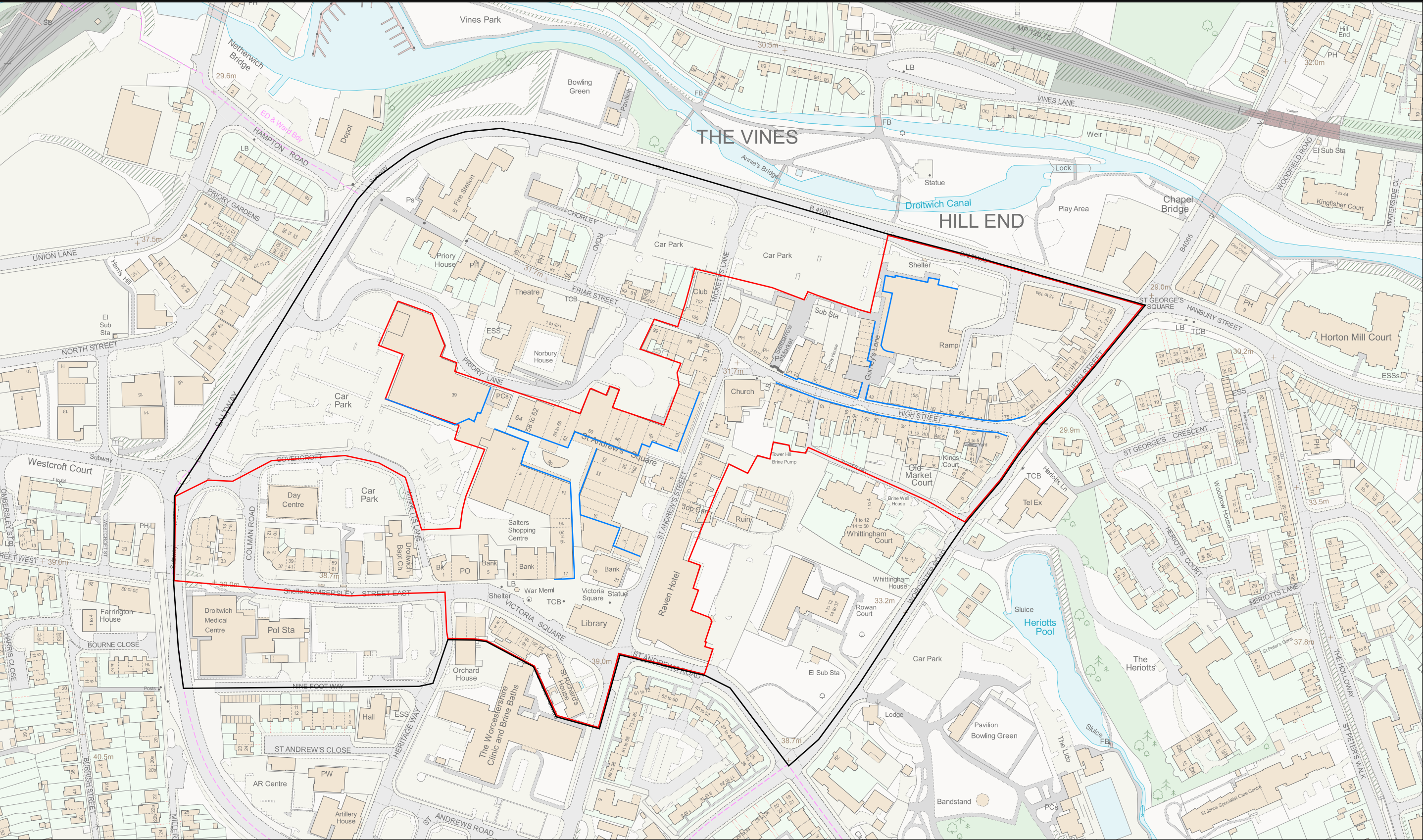


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Town Centre Boundary —
Primary Shopping Area —
Primary Shopping Frontage —

Droitwich Town Centre, OS Map



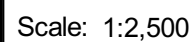
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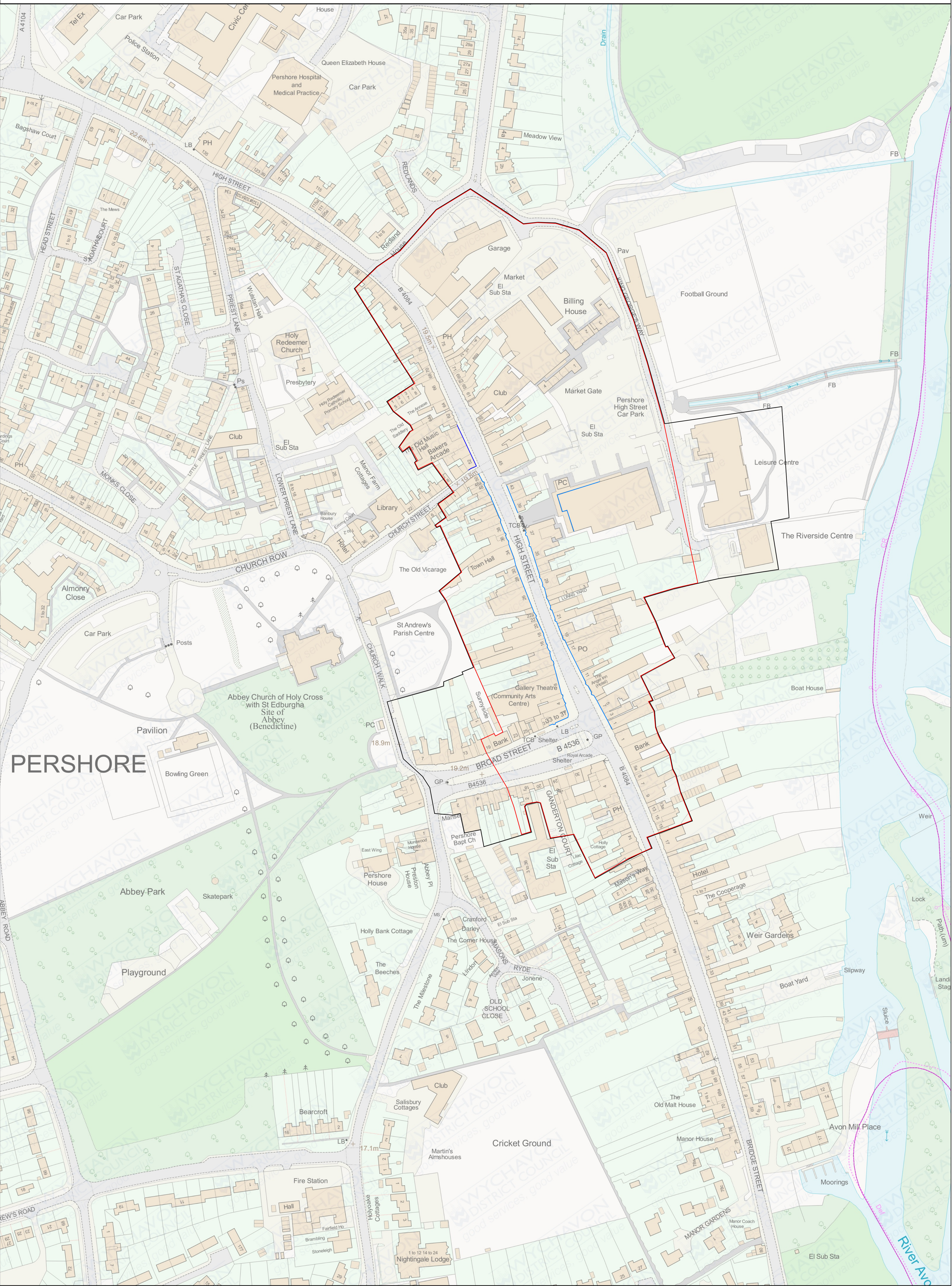
Town Centre Boundary —
Primary Shopping Area —
Primary Shopping Frontage —



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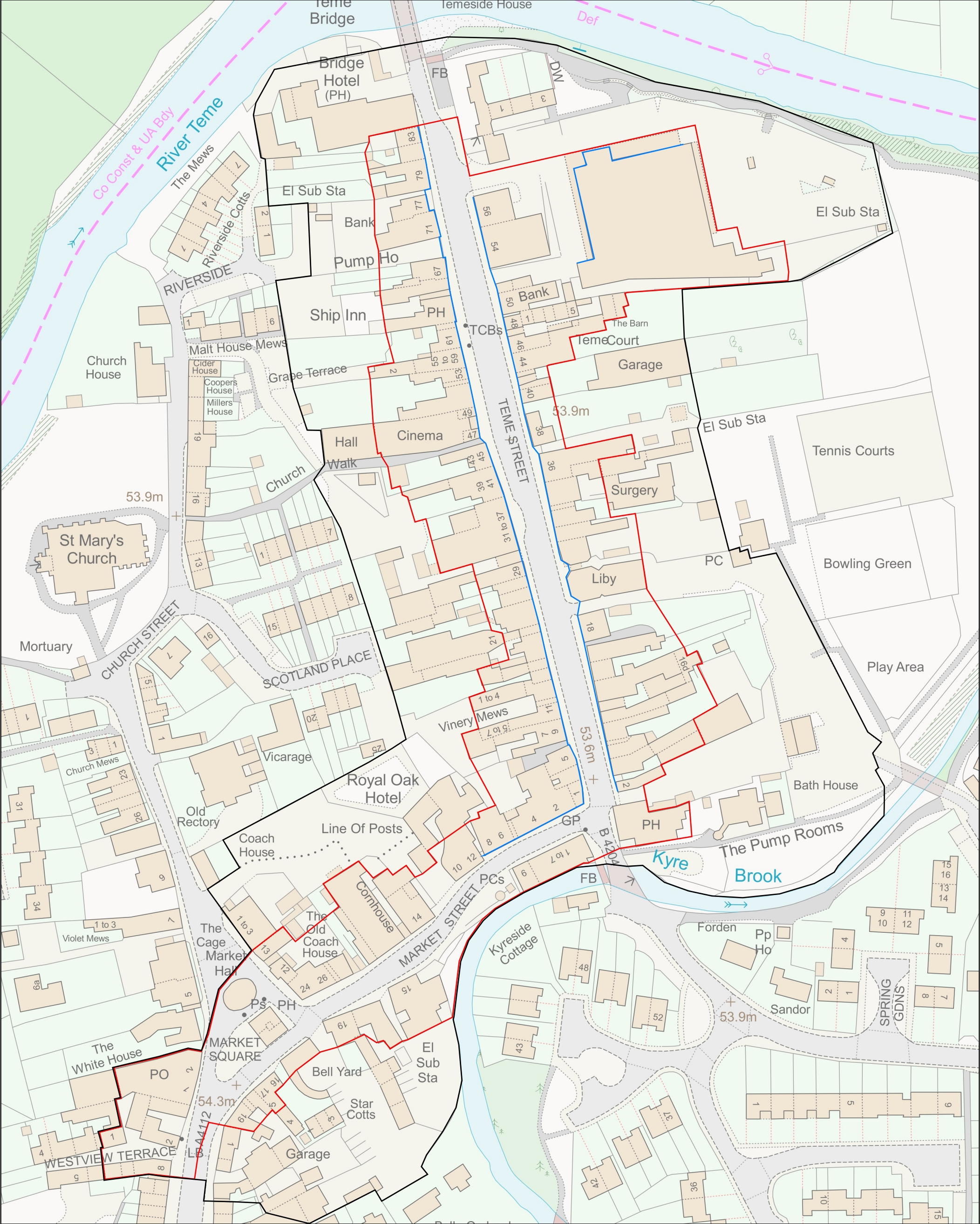


Primary Shopping Frontage



PERSHORE





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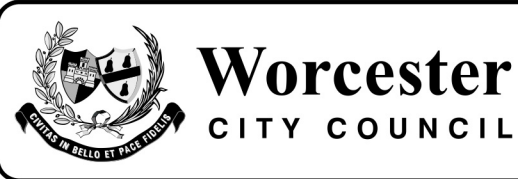
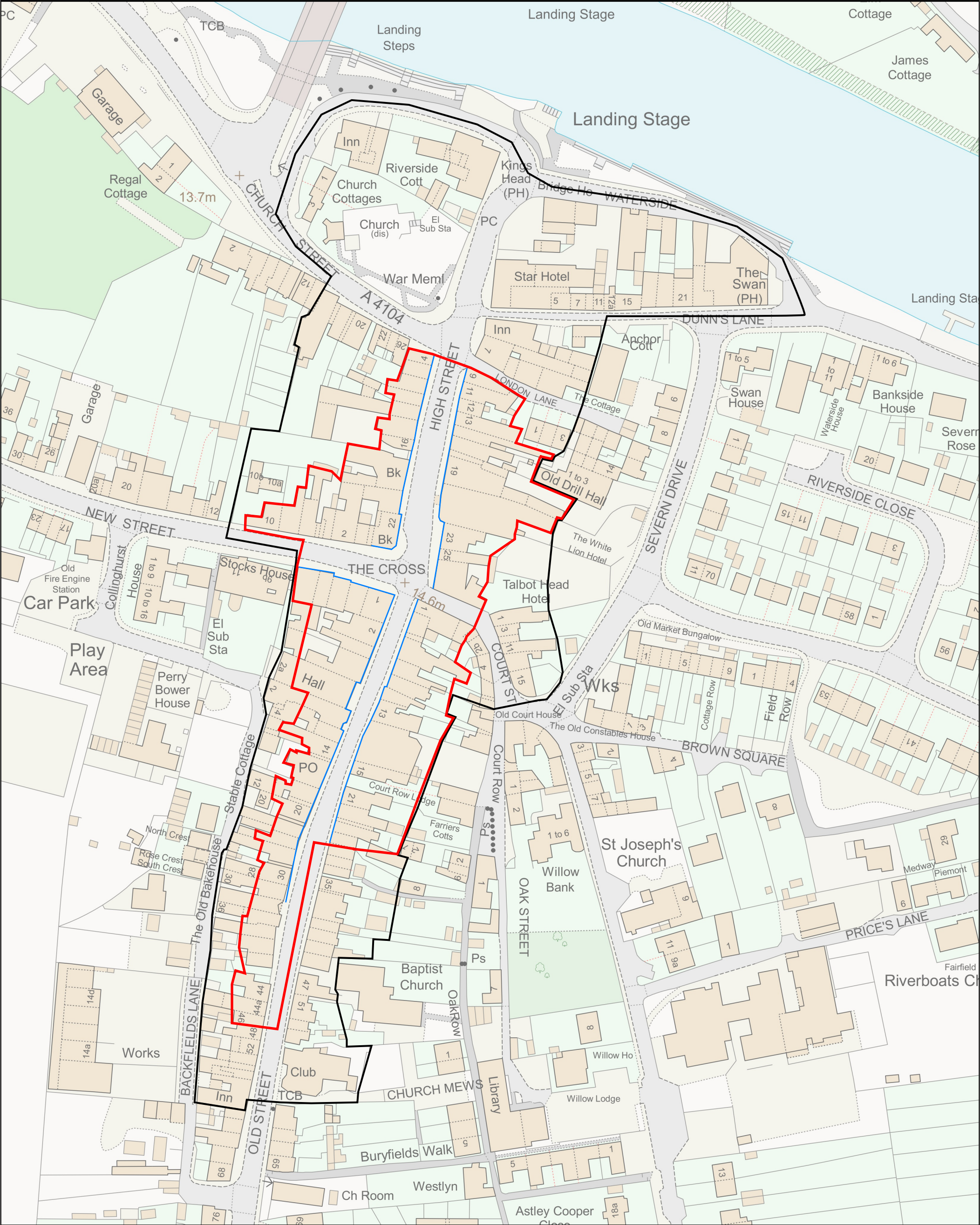


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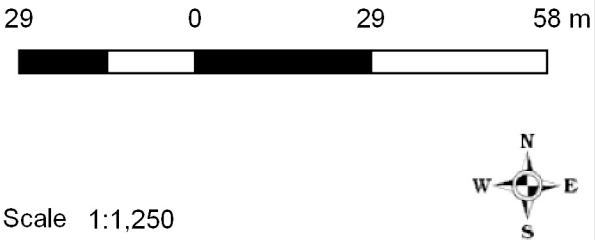


- Town Centre Boundary —
- Primary Shopping Area —
- Primary Shopping Frontage —

Upton-Upon-Severn, OS Map



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Town Centre Boundary —
Primary Shopping Area —
Primary Shopping Frontage —