TABLE 1: STUDY AREA POPULATION

	2006	2007	2012	2017	2026
Droitwich Zone	33892	34097	34647	35344	36643
Evesham Zone	46976	47260	48023	48988	50789
Pershore Zone	25898	26054	26475	27007	28000
Total	**106766**	**107412**	**109145**	**111339**	**115433**

Notes:
Sources - see report

TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE (£)

	2007	2011	2017	2026
Droitwich Zone	1616	1559	1616	1752
Evesham Zone	1619	1563	1620	1756
Pershore Zone	1696	1637	1697	1839

Notes:
2003 based expenditure data from Experian
Growth rates from 2008 taken from Retail Planner Briefing Note 8.1 Aug 2010 -

2005 prices

TABLE 3: TOTAL CONVENIENCE GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	55.1	54.0	57.1	64.2
Evesham Zone	76.5	75.0	79.3	89.2
Pershore Zone	44.2	43.3	45.8	51.5
Total	**175.8**	**172.4**	**182.3**	**204.9**

Notes:

Table 1 x Table 2
2005 prices

TABLE 4: MAIN FOOD SHOPPING

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Somerfield, High Street, EVESHAM	0.0%	0.0	4.3%	2.3	0.4%	0.1	**2.0%**	**2.4**
Iceland, High Street, EVESHAM	0.0%	0.0	1.7%	0.9	0.4%	0.1	**0.8%**	**1.0**
M&S, Riverside Centre, EVESHAM	0.0%	0.0	1.2%	0.6	0.4%	0.1	**0.6%**	**0.8**
Tesco, Worcester Road, EVESHAM	0.3%	0.1	55.5%	29.7	34.6%	10.7	**33.0%**	**40.6**
Morrisons, Four Pools, EVESHAM	0.0%	0.0	25.8%	13.8	6.0%	1.9	**12.7%**	**15.7**
Local Stores, EVESHAM	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Co-op, High Street, PERSHORE	0.0%	0.0	0.2%	0.1	9.8%	3.0	**2.6%**	**3.2**
Somerfield, Racecourse Road, PERSHORE	0.0%	0.0	0.2%	0.1	10.7%	3.3	**2.8%**	**3.4**
Costcutter, Hurst Road, PERSHORE	0.0%	0.0	0.0%	0.0	0.4%	0.1	**0.1%**	**0.1**
Local Stores, PERSHORE	0.3%	0.1	0.0%	0.0	0.0%	0.0	**0.1%**	**0.1**
Morrisons, St Andrews Centre, DROITWICH	33.0%	12.7	0.0%	0.0	1.3%	0.4	**10.7%**	**13.1**
Waitrose, Saltway, DROITWICH	16.0%	6.2	0.0%	0.0	1.3%	0.4	**5.3%**	**6.6**
Other Town Centre, DROITWICH	0.3%	0.1	0.0%	0.0	0.0%	0.0	**0.1%**	**0.1**
Worcester	26.0%	10.0	0.5%	0.3	19.7%	6.1	**13.3%**	**16.4**
Bromsgrove	16.0%	6.2	0.0%	0.0	0.4%	0.1	**5.1%**	**6.3**
Redditch	2.7%	1.0	1.9%	1.0	3.8%	1.2	**2.6%**	**3.2**
Cheltenham	0.0%	0.0	1.9%	1.0	1.7%	0.5	**1.3%**	**1.6**
Tewkesbury	0.0%	0.0	0.0%	0.0	2.6%	0.8	**0.6%**	**0.8**
Kidderminster	2.0%	0.8	0.0%	0.0	0.0%	0.0	**0.6%**	**0.8**
Malvern	0.3%	0.1	0.0%	0.0	2.1%	0.7	**0.6%**	**0.8**
Broadway	0.0%	0.0	1.0%	0.5	0.0%	0.0	**0.4%**	**0.5**
Alcester	0.0%	0.0	0.5%	0.3	0.9%	0.3	**0.4%**	**0.5**
Birmingham	0.3%	0.1	0.0%	0.0	0.0%	0.0	**0.1%**	**0.1**
Bidford on Avon	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Bishops Cleeve	0.0%	0.0	0.5%	0.3	0.9%	0.3	**0.4%**	**0.5**
Gloucester	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Merry Hill	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Stratford upon Avon	0.3%	0.1	0.7%	0.4	0.9%	0.3	**0.6%**	**0.8**
Upton upon Severn	0.0%	0.0	0.0%	0.0	0.9%	0.3	**0.2%**	**0.3**
Reading	0.3%	0.1	0.0%	0.0	0.0%	0.0	**0.1%**	**0.1**
Witney	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Other	0.3%	0.1	0.5%	0.3	0.0%	0.0	**0.3%**	**0.4**
Internet / mail order	1.7%	0.6	2.4%	1.3	0.9%	0.3	**1.8%**	**2.2**
Total	100%	38.6	100%	53.6	100%	30.9	**100%**	**123.1**

Notes
Household survey results and Table 3
Assumed 70% of total convenience goods expenditure is spent at main-food shopping destination

2005 prices

TABLE 5: TOP-UP FOOD SHOPPING

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Somerfield, High Street, EVESHAM	0.8%	0.1	9.5%	2.2	1.0%	0.1	**4.6%**	**2.4**
Iceland, High Street, EVESHAM	0.0%	0.0	4.9%	1.1	1.0%	0.1	**2.4%**	**1.3**
M&S, Riverside Centre, EVESHAM	0.0%	0.0	8.2%	1.9	2.0%	0.3	**4.1%**	**2.2**
Other Town Centre, EVESHAM	0.0%	0.0	0.3%	0.1	0.0%	0.0	**0.1%**	**0.1**
Tesco, Worcester Road, EVESHAM	0.0%	0.0	19.2%	4.4	9.0%	1.2	**10.6%**	**5.6**
Morrisons, Four Pools, EVESHAM	0.0%	0.0	20.4%	4.7	2.5%	0.3	**9.5%**	**5.0**
Co-op, Davies Road, EVESHAM	0.0%	0.0	2.7%	0.6	0.0%	0.0	**1.2%**	**0.6**
Local Stores, EVESHAM	0.0%	0.0	8.2%	1.9	0.5%	0.1	**3.7%**	**2.0**
Co-op, High Street, PERSHORE	0.0%	0.0	0.3%	0.1	24.4%	3.2	**6.3%**	**3.3**
Somerfield, Racecourse Road, PERSHORE	0.0%	0.0	0.0%	0.0	10.4%	1.4	**2.6%**	**1.4**
Costcutter, Hurst Road, PERSHORE	0.0%	0.0	0.0%	0.0	2.0%	0.3	**0.5%**	**0.3**
Local Stores, PERSHORE	0.0%	0.0	0.0%	0.0	12.9%	1.7	**3.3%**	**1.7**
Morrisons, St Andrews Centre, DROITWICH	31.3%	5.2	0.0%	0.0	1.0%	0.1	**10.1%**	**5.3**
Waitrose, Saltway, DROITWICH	12.6%	2.1	0.0%	0.0	1.5%	0.2	**4.3%**	**2.3**
Other Town Centre, DROITWICH	0.0%	0.0	0.0%	0.0	0.0%	0.0	**0.0%**	**0.0**
Local Stores, DROITWICH	32.4%	5.4	0.0%	0.0	1.5%	0.2	**10.5%**	**5.6**
Broadway	0.0%	0.0	7.6%	1.7	0.0%	0.0	**3.3%**	**1.7**
Badsley	0.0%	0.0	2.1%	0.5	0.0%	0.0	**0.9%**	**0.5**
Hampton	0.0%	0.0	2.1%	0.5	0.0%	0.0	**0.9%**	**0.5**
Ombersley	2.3%	0.4	0.0%	0.0	0.0%	0.0	**0.7%**	**0.4**
Eckington	0.0%	0.0	0.0%	0.0	2.5%	0.3	**0.6%**	**0.3**
Harvington	0.0%	0.0	1.2%	0.3	0.0%	0.0	**0.5%**	**0.3**
Drakes Broughton	0.0%	0.0	0.3%	0.1	1.5%	0.2	**0.5%**	**0.3**
Inkberrow	0.0%	0.0	0.0%	0.0	1.5%	0.2	**0.4%**	**0.2**
Honeybourne	0.0%	0.0	0.9%	0.2	0.0%	0.0	**0.4%**	**0.2**
Stoke Prior	1.1%	0.2	0.0%	0.0	0.0%	0.0	**0.4%**	**0.2**
Littleton	0.0%	0.0	0.9%	0.2	0.0%	0.0	**0.4%**	**0.2**
Salford Priors	0.0%	0.0	0.6%	0.1	0.0%	0.0	**0.3%**	**0.1**
Lower Moor	0.0%	0.0	0.0%	0.0	0.5%	0.1	**0.1%**	**0.1**
Offenham	0.0%	0.0	0.6%	0.1	0.0%	0.0	**0.3%**	**0.1**
Willersley	0.0%	0.0	0.6%	0.1	0.0%	0.0	**0.3%**	**0.1**
Bretforton	0.0%	0.0	0.3%	0.1	0.0%	0.0	**0.1%**	**0.1**
Cutnall Green	0.4%	0.1	0.0%	0.0	0.0%	0.0	**0.1%**	**0.1**
Worcester	5.0%	0.8	0.3%	0.1	12.4%	1.6	**4.8%**	**2.5**
Bromsgrove	9.5%	1.6	0.0%	0.0	0.0%	0.0	**3.0%**	**1.6**
Redditch	0.4%	0.1	0.9%	0.2	3.5%	0.5	**1.4%**	**0.7**
Alcester	0.0%	0.0	1.8%	0.4	2.5%	0.3	**1.4%**	**0.7**
Other Outside Survey Area	4.2%	0.7	5.5%	1.3	6.0%	0.8	**5.2%**	**2.7**
Internet / mail order	0.0%	0.0	0.3%	0.1	0.0%	0.0	**0.1%**	**0.1**
Total	100%	16.53	100%	23.0	100%	13.3	**100.0%**	**52.7**

Notes
Household Survey Results and Table 3.
Assumed that 30% of total convenience goods expenditure is spent at top-up shopping destination

2005 prices

TABLE 6: COMBINED FOOD SHOPPING

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Somerfield, High Street, EVESHAM	0.2%	0.1	5.9%	4.5	0.6%	0.3	**1.9%**	**4.9**
Iceland, High Street, EVESHAM	0.0%	0.0	2.6%	2.0	0.6%	0.3	**0.9%**	**2.3**
M&S, Riverside Centre, EVESHAM	0.0%	0.0	3.3%	2.5	0.9%	0.4	**1.1%**	**2.9**
Other Town Centre, EVESHAM	0.0%	0.0	0.1%	0.1	0.0%	0.0	**0.0%**	**0.1**
Tesco, Worcester Road, EVESHAM	0.2%	0.1	44.7%	34.1	26.9%	11.9	**18.1%**	**46.2**
Morrisons, Four Pools, EVESHAM	0.0%	0.0	24.3%	18.5	4.9%	2.2	**8.1%**	**20.7**
Co-op, Davies Road, EVESHAM	0.0%	0.0	0.8%	0.6	0.0%	0.0	**0.2%**	**0.6**
Local Stores, EVESHAM	0.2%	0.1	2.5%	1.9	0.1%	0.1	**0.8%**	**2.1**
							31.2%	**79.7**
Co-op, High Street, PERSHORE	0.0%	0.0	0.3%	0.2	14.2%	6.3	**2.5%**	**6.5**
Somerfield, Racecourse Road, PERSHORE	0.0%	0.0	0.2%	0.1	10.6%	4.7	**1.9%**	**4.8**
Costcutter, Hurst Road, PERSHORE	0.0%	0.0	0.0%	0.0	0.9%	0.4	**0.2%**	**0.4**
Local Stores, PERSHORE	0.2%	0.1	0.0%	0.0	3.9%	1.7	**0.7%**	**1.8**
Morrisons, St Andrews Centre, DROITWICH	32.4%	17.9	0.0%	0.0	1.2%	0.5	**7.2%**	**18.4**
Waitrose, Saltway, DROITWICH	14.9%	8.3	0.0%	0.0	1.3%	0.6	**3.5%**	**8.8**
Other Town Centre, DROITWICH	0.2%	0.1	0.0%	0.0	0.0%	0.0	**0.1%**	**0.1**
Local Stores, DROITWICH	9.7%	5.4	0.0%	0.0	0.4%	0.2	**2.2%**	**5.6**
Broadway	0.0%	0.0	3.0%	2.3	0.0%	0.0	**0.9%**	**2.3**
Badsley	0.0%	0.0	0.6%	0.5	0.0%	0.0	**0.2%**	**0.5**
Hampton	0.0%	0.0	0.6%	0.5	0.0%	0.0	**0.2%**	**0.5**
Ombersley	0.7%	0.4	0.0%	0.0	0.0%	0.0	**0.1%**	**0.4**
Eckington	0.0%	0.0	0.0%	0.0	0.7%	0.3	**0.1%**	**0.3**
Harvington	0.0%	0.0	0.4%	0.3	0.0%	0.0	**0.1%**	**0.3**
Drakes Broughton	0.0%	0.0	0.1%	0.1	0.4%	0.2	**0.1%**	**0.3**
Inkberrow	0.0%	0.0	0.0%	0.0	0.4%	0.2	**0.1%**	**0.2**
Honeybourne	0.0%	0.0	0.3%	0.2	0.0%	0.0	**0.1%**	**0.2**
Stoke Prior	0.3%	0.2	0.0%	0.0	0.0%	0.0	**0.1%**	**0.2**
Littleton	0.0%	0.0	0.3%	0.2	0.0%	0.0	**0.1%**	**0.2**
Salford Priors	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Lower Moor	0.0%	0.0	0.0%	0.0	0.1%	0.1	**0.0%**	**0.1**
Offenham	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Willersley	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Bretforton	0.0%	0.0	0.1%	0.1	0.0%	0.0	**0.0%**	**0.1**
Cutnall Green	0.1%	0.1	0.0%	0.0	0.0%	0.0	**0.0%**	**0.1**
Worcester	19.6%	10.8	0.4%	0.3	17.5%	7.7	**7.4%**	**18.9**
Bromsgrove	14.0%	7.7	0.0%	0.0	0.3%	0.1	**3.1%**	**7.9**
Redditch	2.0%	1.1	1.6%	1.2	3.7%	1.7	**1.6%**	**4.0**
Alcester	0.0%	0.0	0.9%	0.7	1.3%	0.6	**0.5%**	**1.3**
Other Outside Survey Area	3.8%	2.1	4.8%	3.7	8.1%	3.6	**3.7%**	**9.4**
Internet / Mail Order	1.2%	0.6	1.8%	1.4	0.6%	0.3	**0.9%**	**2.3**
Total	100%	55.2	100%	76.4	100%	44.2	**100%**	**255.6**

Notes
Table 4 + Table 5

2005 prices

TABLE 7a: COMPARISON GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	2695	3002	3420	4415
Evesham Zone	2670	2975	3389	4375
Pershore Zone	2888	3187	3630	4686

TABLE 7b: NON-BULKY COMPARISON GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	1869	2010	2290	2956
Evesham Zone	1850	1990	2267	2926
Pershore Zone	1985	2135	2432	3140

TABLE 7c: BULKY COMPARISON GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	826	888	1012	1306
Evesham Zone	820	882	1005	1298
Pershore Zone	903	971	1106	1428

Notes:
2003 based expenditure data from Experian
Growth rates from 2008 taken from Retail Planner Briefing Note 8.1 Aug 2010 -

2005 prices

TABLE 7d: CLOTHING AND FASHION GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	733	789	899	1160
Evesham Zone	670	720	821	1059
Pershore Zone	704	757	862	1113

TABLE 7e: OTHER NON-BULKY GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	1176	1265	1441	1860
Evesham Zone	1180	1269	1446	1867
Pershore Zone	1281	1378	1570	2027

TABLE 7f: DIY GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	200	215	245	317
Evesham Zone	206	221	252	325
Pershore Zone	243	261	298	384

TABLE 7g: LARGE ELECTRICAL GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	69	75	85	110
Evesham Zone	68	73	84	108
Pershore Zone	70	76	86	111

TABLE 7h: SMALL ELECTRICAL GOODS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	222	239	272	351
Evesham Zone	216	232	264	341
Pershore Zone	239	257	292	377

TABLE 7i: FURNITURE AND FLOOR COVERINGS PER CAPITA EXPENDITURE (£)

	2007	2012	2017	2026
Droitwich Zone	334	360	410	529
Evesham Zone	331	356	406	524
Pershore Zone	351	377	430	555

Notes:
2003 based expenditure data from Experian
Growth rates from 2008 taken from Retail Planner Briefing Note 8.1 Aug 2010 -

2005 prices

TABLE 8a: COMPARISON GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	91.9	104.0	120.9	161.8
Evesham Zone	126.2	142.9	166.0	222.2
Pershore Zone	75.2	84.4	98.0	131.2
Total	**293.3**	**331.3**	**385.0**	**515.2**

TABLE 8b: NON-BULKY COMPARISON GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	63.7	69.6	80.9	108.3
Evesham Zone	87.4	95.6	111.0	148.6
Pershore Zone	51.7	56.5	65.7	87.9
Total	**202.9**	**221.7**	**257.7**	**344.8**

TABLE 8c: BULKY COMPARISON GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	28.2	30.8	35.8	47.9
Evesham Zone	38.8	42.4	49.2	65.9
Pershore Zone	23.5	25.7	29.9	40.0
Total	**90.5**	**98.9**	**114.9**	**153.8**

Notes:
Table 1 x Table 7
2005 prices

TABLE 8d: CLOTHING AND FASHION GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	25.0	27.3	31.8	42.5
Evesham Zone	31.7	34.6	40.2	53.8
Pershore Zone	18.3	20.0	23.3	31.2
Total	**75.0**	**82.0**	**95.3**	**127.5**

TABLE 8e: OTHER NON-BULKY GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	40.1	43.8	50.9	68.1
Evesham Zone	55.8	61.0	70.8	94.8
Pershore Zone	33.4	36.5	42.4	56.7
Total	**129.2**	**141.3**	**164.1**	**219.7**

TABLE 8f: DIY GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	6.8	7.5	8.7	11.6
Evesham Zone	9.7	10.5	12.0	14.3
Pershore Zone	6.3	6.8	7.8	9.3
Total	**22.9**	**24.8**	**28.5**	**35.3**

TABLE 8g: LARGE ELECTRICAL GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	2.4	2.6	3.0	4.0
Evesham Zone	3.2	3.5	4.1	5.5
Pershore Zone	1.8	2.0	2.3	3.1
Total	**7.4**	**8.1**	**9.4**	**12.6**

TABLE 8h: SMALL ELECTRICAL GOODS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	7.6	8.3	9.6	12.9
Evesham Zone	10.2	11.1	12.9	17.3
Pershore Zone	6.2	6.8	7.9	10.6
Total	**24.0**	**26.2**	**30.5**	**40.8**

TABLE 8i: FURNITURE AND FLOOR COVERINGS EXPENDITURE (£m)

	2007	2012	2017	2026
Droitwich Zone	11.4	12.5	14.5	19.4
Evesham Zone	15.6	17.1	19.9	26.6
Pershore Zone	9.1	10.0	11.6	15.5
Total	**36.2**	**39.6**	**46.0**	**61.5**

Notes:
Table 1 x Table 7
2005 prices

TABLE 9: CLOTHING, SHOES & FASHION GOODS

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Evesham Town Centre	0.3%	0.1	31.3%	9.9	9.7%	1.8	**15.7%**	**11.8**
Droitwich Town Centre	18.5%	4.6	0.0%	0.0	0.4%	0.1	**6.3%**	**4.7**
Pershore Town Centre	0.7%	0.2	1.6%	0.5	20.3%	3.7	**5.9%**	**4.4**
Tesco, Evesham	0.0%	0.0	0.0%	0.0	0.8%	0.2	**0.2%**	**0.2**
Broadway	0.0%	0.0	0.5%	0.1	0.0%	0.0	**0.2%**	**0.1**
Worcester	47.5%	11.9	9.2%	2.9	41.9%	7.7	**30.0%**	**22.5**
Cheltenham	0.7%	0.2	26.0%	8.2	9.3%	1.7	**13.5%**	**10.1**
Stratford upon Avon	0.3%	0.1	13.3%	4.2	1.3%	0.2	**6.0%**	**4.5**
Redditch	3.6%	0.9	3.9%	1.2	3.0%	0.5	**3.6%**	**2.7**
Birmingham	4.3%	1.1	1.8%	0.6	1.3%	0.2	**2.5%**	**1.9**
Bromsgrove	5.0%	1.2	0.0%	0.0	0.0%	0.0	**1.7%**	**1.2**
Kidderminster	4.6%	1.2	0.2%	0.1	0.0%	0.0	**1.6%**	**1.2**
Malvern	1.7%	0.4	0.5%	0.1	1.7%	0.3	**1.2%**	**0.9**
Merry Hill Birmingham	2.3%	0.6	0.0%	0.0	0.0%	0.0	**0.8%**	**0.6**
Solihull	1.0%	0.2	0.2%	0.1	0.0%	0.0	**0.4%**	**0.3**
London	0.0%	0.0	0.7%	0.2	0.4%	0.1	**0.4%**	**0.3**
Weston-super-Mare	0.3%	0.1	0.5%	0.1	0.4%	0.1	**0.4%**	**0.3**
Swindon	0.0%	0.0	0.5%	0.1	0.8%	0.2	**0.4%**	**0.3**
Tewkesbury	0.0%	0.0	0.2%	0.1	1.3%	0.2	**0.4%**	**0.3**
Dudley	0.7%	0.2	0.2%	0.1	0.0%	0.0	**0.3%**	**0.2**
Tamworth	0.3%	0.1	0.5%	0.1	0.0%	0.0	**0.3%**	**0.2**
Bristol	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Gloucester	0.0%	0.0	0.2%	0.1	0.0%	0.0	**0.1%**	**0.1**
Abroad	0.3%	0.1	0.5%	0.1	2.5%	0.5	**0.9%**	**0.7**
Others (outside survey area)	4.0%	1.0	3.2%	1.0	0.8%	0.2	**2.9%**	**2.2**
Internet / mail order / catalogue	4.0%	1.0	4.8%	1.5	3.8%	0.7	**4.3%**	**3.2**
Total	100%	25.0	100%	31.7	100%	18.3	**100%**	**75.0**

Notes

Household Survey Results x Table 8d

2005 prices

TABLE 10: DIY GOODS

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Evesham Town Centre	0.0%	0.00	12.0%	1.17	5.4%	0.34	**6.6%**	**1.5**
Droitwich Town Centre	14.3%	0.98	0.0%	0.00	0.4%	0.03	**4.4%**	**1.0**
Pershore Town Centre	0.0%	0.00	0.3%	0.02	5.8%	0.37	**1.7%**	**0.4**
B&Q, Four Pools, Evesham	0.0%	0.00	46.4%	4.51	30.0%	1.90	**28.0%**	**6.4**
Focus, Four Pools, Evesham	0.0%	0.00	29.1%	2.83	11.2%	0.71	**15.5%**	**3.5**
Jewson, Four Pools, Evesham	0.0%	0.00	0.3%	0.02	0.0%	0.00	**0.1%**	**0.0**
Various Stores, Four Pools, Evesham	0.0%	0.00	3.0%	0.29	2.7%	0.17	**2.0%**	**0.5**
Tesco, Evesham	0.0%	0.00	0.3%	0.02	0.0%	0.00	**0.1%**	**0.0**
Homebase, Roman Way Retail Park, Droitwich	50.5%	3.45	0.0%	0.00	1.3%	0.09	**15.4%**	**3.5**
Local Stores, Droitwich	0.7%	0.05	0.0%	0.00	0.0%	0.00	**0.2%**	**0.0**
Broadway	0.0%	0.00	1.8%	0.17	0.0%	0.00	**0.7%**	**0.2**
Worcester	15.0%	1.02	0.0%	0.00	28.7%	1.82	**12.4%**	**2.8**
Redditch	5.2%	0.36	2.0%	0.19	7.6%	0.48	**4.5%**	**1.0**
Kidderminster	7.7%	0.52	0.0%	0.00	0.9%	0.06	**2.5%**	**0.6**
Cheltenham	0.0%	0.00	2.3%	0.22	2.7%	0.17	**1.7%**	**0.4**
Bromsgrove	3.5%	0.24	0.0%	0.00	0.0%	0.00	**1.0%**	**0.2**
Stratford upon Avon	0.0%	0.00	1.3%	0.12	0.4%	0.03	**0.7%**	**0.2**
Birmingham	0.3%	0.02	0.3%	0.02	0.4%	0.03	**0.3%**	**0.1**
Stourport	1.0%	0.07	0.0%	0.00	0.0%	0.00	**0.3%**	**0.1**
Other (outside survey area)	0.7%	0.05	1.0%	0.10	1.8%	0.11	**1.1%**	**0.3**
Internet / mail order / catalogue	1.0%	0.07	0.3%	0.02	0.4%	0.03	**0.5%**	**0.1**
Total	100%	6.8	100%	9.7	100%	6.3	**100%**	**22.9**

Notes

Household Survey Results x Table 8f
2005 prices

TABLE 11: FURNITURE AND FLOOR COVERINGS

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Evesham Town Centre	0.4%	0.04	40.3%	6.3	16.3%	1.5	**21.7%**	**7.8**
Droitwich Town Centre	24.9%	2.8	0.6%	0.1	2.0%	0.2	**8.6%**	**3.1**
Pershore Town Centre	0.4%	0.04	1.1%	0.2	11.9%	1.1	**3.6%**	**1.3**
B&Q, Four Pools, Evesham	0.0%	0.0	3.1%	0.5	0.0%	0.0	**1.3%**	**0.5**
Focus, Four Pools, Evesham	0.0%	0.0	2.5%	0.4	0.5%	0.05	**1.2%**	**0.4**
Evesham Industral Estate	0.0%	0.0	0.8%	0.1	0.0%	0.0	**0.4%**	**0.1**
Other Shops, Four Pools, Evesham	0.4%	0.04	3.3%	0.5	2.5%	0.2	**2.2%**	**0.8**
DFS, Roman Way RP, Droitwich	5.7%	0.6	0.0%	0.0	0.0%	0.0	**1.8%**	**0.6**
Homebase, Roman Way RP, Droitwich	0.8%	0.1	0.0%	0.0	0.0%	0.0	**0.2%**	**0.1**
Broadway	0.0%	0.0	0.3%	0.04	0.0%	0.0	**0.1%**	**0.04**
Blackminster	0.0%	0.0	0.8%	0.1	0.5%	0.05	**0.5%**	**0.2**
Worcester	38.9%	4.4	6.1%	1.0	40.1%	3.7	**25.0%**	**9.1**
Cheltenham	0.0%	0.0	20.0%	3.1	6.9%	0.6	**10.4%**	**3.8**
Kidderminster	9.4%	1.1	0.0%	0.0	3.5%	0.3	**3.8%**	**1.4**
Stratford upon Avon	0.0%	0.0	6.4%	1.0	0.5%	0.05	**2.9%**	**1.0**
Birmingham	2.3%	0.3	2.8%	0.4	3.0%	0.3	**2.7%**	**1.0**
Bromsgrove	6.8%	0.8	0.0%	0.0	0.5%	0.05	**2.3%**	**0.8**
Redditch	1.5%	0.2	2.2%	0.3	2.5%	0.2	**2.1%**	**0.7**
Bristol	0.4%	0.04	0.8%	0.1	1.5%	0.1	**0.9%**	**0.3**
Alcester	0.0%	0.0	1.7%	0.3	0.5%	0.05	**0.8%**	**0.3**
Malvern	0.0%	0.0	0.6%	0.1	1.5%	0.1	**0.6%**	**0.2**
Gloucester	0.0%	0.0	1.1%	0.2	0.0%	0.0	**0.5%**	**0.2**
Tewkesbury	0.0%	0.0	0.6%	0.1	1.0%	0.1	**0.5%**	**0.2**
Wednesbury	0.4%	0.04	0.8%	0.1	0.0%	0.0	**0.5%**	**0.2**
Ikea, Wednesbury	0.8%	0.1	0.0%	0.0	0.5%	0.05	**0.4%**	**0.1**
Merry Hill, Birmingham	0.8%	0.1	0.0%	0.0	0.0%	0.0	**0.2%**	**0.1**
Other (outside survey area)	3.8%	0.4	2.2%	0.3	1.5%	0.1	**2.5%**	**0.9**
Internet / mail order / catalogue	2.6%	0.3	1.9%	0.3	3.0%	0.3	**2.4%**	**0.9**
Total	100%	11.4	100%	15.6	100%	9.1	**100%**	**36.2**

Notes

Household Survey Results x Table 8i
2005 prices

TABLE 12: LARGE ELECTRICAL GOODS

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Evesham Town Centre	0.3%	0.01	68.7%	2.2	13.4%	0.2	**33.2%**	**2.5**
Droitwich Town centre	18.0%	0.4	0.0%	0.0	1.3%	0.02	**6.1%**	**0.4**
Pershore Town Centre	0.0%	0.0	0.2%	0.01	4.9%	0.1	**1.3%**	**0.1**
Other, Evesham	0.0%	0.0	1.2%	0.04	0.4%	0.01	**0.7%**	**0.05**
Miller Bros, Roman Way RP, Droitwich	24.1%	0.6	0.0%	0.0	2.2%	0.04	**8.2%**	**0.6**
Other, Droitwich	0.3%	0.01	0.0%	0.0	0.0%	0.0	**0.1%**	**0.01**
Worcester	40.0%	0.9	4.0%	0.1	54.0%	1.0	**27.8%**	**2.1**
Cheltenham	0.0%	0.0	10.9%	0.4	4.5%	0.1	**5.9%**	**0.4**
Redditch	3.1%	0.1	2.0%	0.1	4.0%	0.1	**2.8%**	**0.2**
Stratford upon Avon	0.0%	0.0	3.2%	0.1	0.4%	0.01	**1.5%**	**0.1**
Bromsgrove	3.4%	0.1	0.0%	0.0	0.4%	0.01	**1.2%**	**0.1**
Bristol / Cribbs Causeway	0.0%	0.0	0.2%	0.01	2.7%	0.05	**0.8%**	**0.1**
Others (outside study area)	4.7%	0.1	2.0%	0.1	4.5%	0.1	**3.5%**	**0.3**
Internet / mail order / catalogue	6.1%	0.1	7.5%	0.2	7.1%	0.1	**7.0%**	**0.5**
Total	100%	2.4	100%	3.2	100%	1.8	**100%**	**7.4**

Notes

Household Survey Results x Table 8g
2005 prices

TABLE 13: SMALL ELECTRICAL GOODS

	Droitwich Zone		Evesham Zone		Pershore Zone		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Evesham Town Centre	0.7%	0.1	63.1%	6.4	19.5%	1.2	**32.1%**	**7.7**
Droitwich Town Centre	19.3%	1.5	0.0%	0.0	2.4%	0.1	**6.7%**	**1.6**
Pershore Town Centre	0.0%	0.0	0.5%	0.1	10.0%	0.6	**2.8%**	**0.7**
Bond Industrial Estate, Evesham	0.0%	0.0	0.5%	0.1	0.0%	0.0	**0.2%**	**0.1**
Tesco, Evesham	0.0%	0.0	4.0%	0.4	2.4%	0.1	**2.3%**	**0.6**
B&Q, Four Pools, Evesham	0.0%	0.0	0.3%	0.03	0.0%	0.0	**0.1%**	**0.03**
Other Stores, Evesham	0.0%	0.0	1.9%	0.2	1.0%	0.1	**1.0%**	**0.2**
Miller Bros, Roman Way RP, Droitwich	15.3%	1.2	0.0%	0.0	1.4%	0.1	**5.2%**	**1.2**
Other Stores, Droitwich	1.1%	0.1	0.0%	0.0	0.0%	0.0	**0.3%**	**0.1**
Broadway	0.0%	0.0	0.3%	0.03	0.0%	0.0	**0.1%**	**0.03**
Worcester	34.9%	2.6	2.1%	0.2	36.2%	2.3	**21.3%**	**5.1**
Cheltenham	0.7%	0.1	9.8%	1.0	4.3%	0.3	**5.5%**	**1.3**
Redditch	2.2%	0.2	2.1%	0.2	4.3%	0.3	**2.7%**	**0.6**
Stratford upon Avon	0.4%	0.03	4.0%	0.4	0.5%	0.03	**1.9%**	**0.5**
Birmingham	1.5%	0.1	2.4%	0.2	1.4%	0.1	**1.8%**	**0.4**
Bromsgrove	5.5%	0.4	0.0%	0.0	0.5%	0.03	**1.8%**	**0.4**
Malvern	0.7%	0.1	0.0%	0.0	4.8%	0.3	**1.5%**	**0.4**
Kidderminster	3.6%	0.3	0.0%	0.0	0.0%	0.0	**1.1%**	**0.3**
Solihull	1.1%	0.1	0.3%	0.03	0.5%	0.03	**0.6%**	**0.1**
Abroad	1.1%	0.1	0.0%	0.0	0.0%	0.0	**0.3%**	**0.1**
Other (outside study area)	2.2%	0.2	1.9%	0.2	4.8%	0.3	**2.7%**	**0.7**
Internet / mail order / catalogue	9.8%	0.7	6.9%	0.7	6.2%	0.4	**7.6%**	**1.8**
Total	100%	7.6	100%	10.2	100%	6.2	**100%**	**24.0**

Notes

Household Survey Results x Table 8h
2005 prices

TABLE 14: OTHER NON-BULKY COMPARISON GOODS

	Zone 1		Zone 2		Zone 3		**Total**	
	%	£m	%	£m	%	£m	**%**	**£m**
Evesham Town Centre	0.7%	0.3	48.5%	27.1	10.3%	3.4	**23.8%**	**30.8**
Droitwich Town Centre	20.4%	8.2	0.0%	0.0	1.5%	0.5	**6.7%**	**8.7**
Pershore Town Centre	0.4%	0.1	0.5%	0.3	16.2%	5.4	**4.5%**	**5.8**
Tesco, Worcester Road, Evesham	0.0%	0.0	4.3%	2.4	3.9%	1.3	**2.9%**	**3.7**
Morrisons, Four Pools, Evesham	0.0%	0.0	0.3%	0.2	0.0%	0.0	**0.1%**	**0.2**
Morrisons, Droitwich	1.8%	0.7	0.0%	0.0	0.5%	0.2	**0.7%**	**0.9**
Broadway	0.0%	0.0	0.3%	0.2	0.0%	0.0	**0.1%**	**0.2**
Worcester	49.6%	19.9	6.5%	3.6	38.2%	12.8	**28.1%**	**36.3**
Cheltenham	0.0%	0.0	17.3%	9.7	7.4%	2.5	**9.4%**	**12.1**
Stratford upon Avon	0.0%	0.0	7.6%	4.2	1.5%	0.5	**3.7%**	**4.7**
Redditch	2.5%	1.0	1.9%	1.1	3.4%	1.1	**2.5%**	**3.2**
Bromsgrove	6.1%	2.4	0.0%	0.0	0.0%	0.0	**1.9%**	**2.4**
Birmingham	2.9%	1.1	0.5%	0.3	1.5%	0.5	**1.5%**	**1.9**
Merry Hill, Birmingham	3.6%	1.4	0.3%	0.2	0.0%	0.0	**1.2%**	**1.6**
Kidderminster	1.1%	0.4	0.0%	0.0	0.0%	0.0	**0.3%**	**0.4**
Tewkesbury	0.0%	0.0	0.5%	0.3	1.0%	0.3	**0.5%**	**0.6**
Other (outside study area)	1.4%	0.6	1.1%	0.6	1.0%	0.3	**1.2%**	**1.5**
Internet / mail order / catalogue	9.6%	3.9	10.3%	5.7	13.7%	4.6	**11.0%**	**14.2**
Total	100%	40.1	100%	55.8	100%	33.4	**100%**	**129.2**

Notes

Household Survey Results x Table 8e
2005 prices

TABLE 15: BENCHMARK AND SURVEY-DERIVED TURNOVERS OF LARGE FOODSTORES IN THE DISTRICT

	Sales Area	Convenience Goods Sales Area	Typical Sales Density (Convenience Goods)	Benchmark Turnover	Survey Derived Turnover	Inflow from Worc / Malv Hills	Total Turnover	Difference	
	sq.m.net	sq.m.net	sq.m.net	(£m)	(£m)	(£m)	(£m)	£m	%
Evesham									
Tesco	4265	2986	12316	36.8	46.2	1.6	47.8	11.0	30
Morrisons	2422	2130	11000	23.4	20.7	0.0	20.7	-2.7	-12
Co-op/Somerfield	1187	1068	5914	6.3	4.9	0.0	4.9	-1.5	-23
M&S									
Iceland	250	225	5308	1.2	2.3	0.0	2.3	1.1	91
Evesham Total				67.7	74.0	1.6	75.6	7.9	12
Droitwich									
Morrisons	1788	1520	11000	16.7	18.4	1.0	19.4	2.7	16
Waitrose	2011	1810	11665	21.1	8.8	1.8	10.6	-10.5	-50
Droitwich Total				37.8	27.3	2.8	30.1	-7.8	-21
Pershore									
Asda	1475	1328	14242	18.9	6.5	0.1	6.6	-12.3	-65
Co-op/Somerfield	791	712	5914	4.2	4.8	0.1	4.9	0.7	17
Pershore Total				23.1	11.3	0.2	11.5	-11.6	-50

Notes
Floorspace figures from Wychavon District Council, Institute of Grocery Distributors, and Experian Goad
Convenience Goods Sales Area estimated by DPDS
Benchmark turnovers derived from Verdict and Mintel data
Expenditure Inflow from Worcester and Malvern Hills administrative areas derived from South Worcestershire Retail Study
2005 prices

TABLE 16a: CONVENIENCE GOODS EXPENDITURE CAPACITY - EVESHAM

Low Growth Scenario

	2007	2012	2017	2026
Total available expenditure in the Study Area (£m)	175.8	172.4	182.3	204.9
Special forms of trading (£m)	2.3	2.3	2.3	2.3
Total available expenditure excl SFT (£m)	173.6	170.1	180.0	202.6
Turnover of stores in Evesham (£m)	79.7	79.7	81.7	85.5
Market Share (of in-store sales)	46%	46%	46%	46%
Turnover potential (£m)	79.7	78.1	82.7	93.1
Overtrading/Undertrading (£m)	7.9	7.9	7.9	7.9
Changes and Commitments				
Aldi Swan Lane		2.9	3.0	3.1
Lidl Broadway Rd		2.2	2.3	2.4
Morrisons (Extension)		3.1	3.2	3.3
Tesco Cheltenham Rd		1.5	1.5	1.6
Expenditure capacity (£m)	**7.9**	**-3.3**	**-1.1**	**5.1**
Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net)		**-334**	**-103**	**476**
Theoretical floorspace based on £5,000/sq.m. sales density assumption (sq.m.net) (rising by 0.5% per annum post 2012)		**-669**	**-206**	**952**

Notes
Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - Nil. Post 2012 0.5% per annum (source: Experian Retail Planner 8.1 Aug 2010)
Market share is 2006 market share held as a constant
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments

2005 prices

TABLE 16b: CONVENIENCE GOODS EXPENDITURE CAPACITY - EVESHAM

High Growth Scenario

	2007	2012	2017	2026
Total available expenditure in the Study Area (£m)	175.8	172.4	182.3	204.9
Special forms of trading (£m)	2.3	2.3	2.3	2.3
Total available expenditure excl SFT (£m)	173.6	170.1	180.0	202.6
Turnover of stores in Evesham (£m)	79.7	79.7	81.7	85.5
Market Share (of in-store sales)	46%	48%	48%	48%
Turnover potential (£m)	79.7	82.1	86.8	97.7
Overtrading/Undertrading (£m)	7.9	7.9	7.9	7.9
Changes and Commitments				
Aldi Swan Lane		2.9	3.0	3.1
Lidl Broadway Rd		2.2	2.3	2.4
Morrisons (Extension)		3.1	3.2	3.3
Tesco Cheltenham Rd		1.5	1.5	1.6
Expenditure capacity (£m)	**7.9**	**0.6**	**3.1**	**9.8**
Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net)		**56**	**300**	**910**
Theoretical floorspace based on £5,000/sq.m. sales density assumption (sq.m.net) (rising by 0.5% per annum post 2012)		**113**	**600**	**1820**

Notes
Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - Nil. Post 2012 0.5% per annum (source: Experian Retail Planner 8.1)
It is assumed that there will be a 5% increase in the 2006 market share by 2012
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments

2005 prices

TABLE 17a: CONVENIENCE GOODS EXPENDITURE CAPACITY - DROITWICH

Low Growth Scenario

	2007	**2012**	**2017**	**2026**
Total available expenditure in the Study Area (£m)	175.8	172.4	182.3	204.9
Special forms of trading (£m)	2.3	2.3	2.3	2.3
Total available expenditure excl SFT (£m)	173.6	170.1	180.0	202.6
Turnover of stores in Droitwich (£m)	33.0	33.0	33.8	35.4
Market Share (of in-store sales)	19%	19%	19%	19%
Turnover potential (£m)	33.0	32.3	34.2	38.5
Overtrading/Undertrading (£m)	-7.8	-7.8	-7.8	-7.8
Changes and Commitments				
Morrisons Extension (£m)				
Aldi store (£m)		3.6	3.6	3.8
Expenditure capacity (£m)	**-7.8**	**-12.0**	**-11.0**	**-8.4**
Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net) (rising by 0.5% per annum post 2012)		-1196	-1074	-787

Notes
Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - Nil. Post 2012 0.5% per annum (source: Experian Retail Planner 8.1)
Market share is 2006 market share held as a constant
Morrisons extension (835sq.m.net) assumed to trade at 30% of existing sales density (£11,782/sq.m.)
Aldi store turnover taken from applicant's retail assessment
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments

2005 prices

TABLE 17b: CONVENIENCE GOODS EXPENDITURE CAPACITY - DROITWICH

High Growth Scenario

	2007	**2012**	**2017**	**2026**
Total available expenditure in the Study Area (£m)	175.8	172.4	182.3	204.9
Special forms of trading (£m)	2.3	2.3	2.3	2.3
Total available expenditure excl SFT (£m)	173.6	170.1	180.0	202.6
Turnover of stores in Droitwich (£m)	33.0	33.0	33.8	35.4
Market Share (of in-store sales)	19%	20%	20%	20%
Turnover potential (£m)	33.0	33.9	35.9	40.4
Overtrading/Undertrading (£m)	-7.8	-7.8	-7.8	-7.8
Changes and Commitments:				
Morrisons Extension (£m)				
Aldi store (£m)		3.6	3.6	3.8
Expenditure capacity (£m)	**-7.8**	**-10.3**	**-9.3**	**-6.5**
Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net) (rising by 0.5% per annum post 2012)		**-1035**	**-907**	**-607**

Notes
Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - Nil. Post 2012 0.5% per annum (source: Experian Retail Planner 8.1)
It is assumed that there will be a 5% increase in the 2006 market share by 2012
Morrisons extension (835sq.m.net) assumed to trade at 30% of existing sales density (£11,782/sq.m.)
Aldi store turnover taken from applicant's retail assessment
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments

2005 prices

TABLE 18a: CONVENIENCE GOODS EXPENDITURE CAPACITY - PERSHORE

Low Growth Scenario

	2007	2011	2016	2021
Total available expenditure in the Study Area (£m)	175.8	172.4	182.3	204.9
Special forms of trading (£m)	2.3	2.3	2.3	2.3
Total available expenditure excl SFT (£m)	173.6	170.1	180.0	202.6
Turnover of stores in Pershore (£m)	13.5	13.5	13.9	14.5
Market Share (of in-store sales)	8%	8%	8%	8%
Turnover potential (£m)	13.5	13.3	14.0	15.8
Overtrading/Undertrading (£m)	-11.6	-11.6	-11.6	-11.6
Changes and Commitments				
Tesco		2.2	2.2	2.3
Expenditure capacity (£m)	**-11.6**	**-14.1**	**-13.7**	**-12.7**
Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net) (rising by 0.5% per annum post 2012)		-1409	-1338	-1184

Notes
Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - Nil. Post 2012 0.5% per annum (source: Experian Retail Planner 8.1)
Market share is 2006 market share held as a constant
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share) and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments

2005 prices

TABLE 18b: CONVENIENCE GOODS EXPENDITURE CAPACITY - PERSHORE

High Growth Scenario

	2007	2012	2017	2026
Total available expenditure in the Study Area (£m)	175.8	172.4	182.3	204.9
Special forms of trading (£m)	2.3	2.3	2.3	2.3
Total available expenditure excl SFT (£m)	173.6	170.1	180.0	202.6
Turnover of stores in Pershore (£m)	13.5	13.5	13.9	14.5
Market Share (of in-store sales)	8%	9%	9%	9%
Turnover potential (£m)	13.5	15.9	16.8	19.0
Overtrading/Undertrading (£m)	-11.6	-11.6	-11.6	-11.6
Changes and Commitments				
Tesco Express High St		2.2	2.2	2.3
Expenditure capacity (£m)	**-11.6**	**-11.4**	**-10.9**	**-9.5**
Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net) (rising by 0.5% per annum post 2012)		**-1144**	**-1064**	**-889**

Notes
Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - Nil. Post 2012 0.5% per annum (source: Experian Retail Planner 8.1)
It is assumed that there will be a 20% increase in the 2006 market share by 2012
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments

2005 prices

TABLE 19a: COMPARISON GOODS EXPENDITURE CAPACITY - EVESHAM

Low Growth Scenario

Non-Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	202.9	221.7	257.7	344.8
Special forms of trading (£m)	17.4	17.4	17.4	17.4
Total available expenditure excl SFT (£m)	185.5	204.3	240.2	327.4
Turnover of stores in Evesham (£m)	46.6	50.2	56.5	69.9
Market Share (of in-store sales)	25%	25%	25%	25%
Turnover potential (£m)	46.6	51.3	60.3	82.2
Expenditure capacity (£m)	0.0	1.1	3.8	12.3
Commitments:				
Retail Warehouses at Worcester Road	26.0	28.0	31.5	39.0
Residual expenditure capacity (£m)	**-26.0**	**-26.9**	**-27.7**	**-26.7**
Theoretical floorspace based on £4,000/sq.m. sales density (rising by 2.4% per annum post 2012)		**-6236**	**-5708**	**-4453**

Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	90.5	98.9	114.9	153.8
Special forms of trading (£m)	3.3	3.3	3.3	3.3
Total available expenditure excl SFT (£m)	87.1	95.5	111.5	150.4
Turnover of stores in Evesham (£m)	32.7	35.3	39.7	49.2
Market Share (of in-store sales)	38%	38%	38%	38%
Turnover potential (£m)	32.7	35.9	41.9	56.5
Expenditure capacity (£m)	0.0	0.6	2.2	7.4
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**0.6**	**2.2**	**7.4**
Theoretical floorspace based on £2,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**146**	**456**	**1228**

Combined Comparison Goods

	2006	*2012*	*2017*	*2026*
Floorspace Capacity		**-6090**	**-5252**	**-3225**

Notes

Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - 1.5% per annum. Post 2012 - 2.4% per annum (source: Experian Retail Planner 8.1)
Market share is 2006 market share held as a constant
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments
Turnover of committed floorspace taken from applicant's retail assessment
Sales density of new floorspace is DPDS estimate
2005 prices

TABLE 19b: COMPARISON GOODS EXPENDITURE CAPACITY - EVESHAM

High Growth Scenario

Non-Bulky Goods

	2007	***2012***	***2017***	***2026***
Total available expenditure in the Study Area (£m)	202.9	221.7	257.7	344.8
Special forms of trading (£m)	17.4	17.4	17.4	17.4
Total available expenditure excl SFT (£m)	185.5	204.3	240.2	327.4
Turnover of stores in Evesham (£m)	46.6	50.2	56.5	69.9
Market Share (of in-store sales)	25.1%	27.6%	27.6%	27.6%
Turnover potential (£m)	46.6	56.4	66.4	90.4
Expenditure capacity (£m)	0.0	6.3	9.9	20.4
Commitments:				
Retail Warehouses at Worcester Road	26.0	28.0	31.5	39.0
Residual expenditure capacity (£m)	**-26.0**	**-21.7**	**-21.7**	**-18.6**
Theoretical floorspace based on £4,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**-5045**	**-4464**	**-3098**

Bulky Goods

	2007	***2012***	***2017***	***2026***
Total available expenditure in the Study Area (£m)	90.5	98.9	114.9	153.8
Special forms of trading (£m)	3.3	3.3	3.3	3.3
Total available expenditure excl SFT (£m)	87.1	95.5	111.5	150.4
Turnover of stores in Evesham (£m)	32.7	35.3	39.7	49.2
Market Share (of in-store sales)	38%	41%	41%	41%
Turnover potential (£m)	32.7	39.5	46.1	62.2
Expenditure capacity (£m)	0.0	4.2	6.4	13.0
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**4.2**	**6.4**	**13.0**
Theoretical floorspace based on £2,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**1959**	**2640**	**4337**

Combined Comparison Goods

	2006	***2012***	***2017***	***2026***
Floorspace Capacity		**-3087**	**-1825**	**1239**

Notes

Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - 1.5% per annum. Post 2012 2.4% per annum (source: Experian Retail Planner 8.1)
It is assumed that there will be a 10% increase in the 2006 market share by 2012
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments
Turnover of committed floorspace taken from applicant's retail assessment
Sales density of new floorspace is DPDS estimate
2005 prices

TABLE 20a: COMPARISON GOODS EXPENDITURE CAPACITY - DROITWICH

Low Growth Scenario

Non-Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	202.9	221.7	257.7	344.8
Special forms of trading (£m)	17.4	17.4	17.4	17.4
Total available expenditure excl SFT (£m)	185.5	204.3	240.2	327.4
Turnover of stores in Droitwich (£m)	14.2	15.3	17.3	21.4
Market Share (of in-store sales)	7.7%	7.7%	7.7%	7.7%
Turnover potential (£m)	14.2	15.7	18.4	25.1
Expenditure capacity (£m)	0.0	0.3	1.2	3.8
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**0.3**	**1.2**	**3.8**
Theoretical floorspace based on £3,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**81**	**242**	**626**

Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	90.5	98.9	114.9	153.8
Special forms of trading (£m)	3.3	3.3	3.3	3.3
Total available expenditure excl SFT (£m)	87.1	95.5	111.5	150.4
Turnover of stores in Droitwich (£m)	12.4	13.4	15.1	18.7
Market Share (of in-store sales)	14.3%	14.3%	14.3%	14.3%
Turnover potential (£m)	12.4	13.6	15.9	21.5
Expenditure capacity (£m)	0.0	0.2	0.8	2.8
Commitments:	4.1	4.7	5.3	6.5
Residual expenditure capacity (£m)	**-4.1**	**-4.5**	**-4.5**	**-3.7**
Theoretical floorspace based on £2,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**-2089**	**-1838**	**-1224**

Combined Comparison Goods

	2006	*2012*	*2017*	*2026*
Floorspace Capacity		**-2009**	**-1596**	**-598**

Notes

Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - 1.5% per annum. Post 2012 2.4% per annum (source: Experian Retail Planner 8.1)
Market share is 2006 market share held as a constant
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments
Commitment: Extant consent for bulky goods non-food retail development at Kidderminster Road - Assumed net sales 2,044sq.m. (80% of 2,555sq.m.gross) and assumed sales density is £2,000/sq.m.
Sales density of new floorspace is DPDS estimate
2005 prices

TABLE 20b: COMPARISON GOODS EXPENDITURE CAPACITY - DROITWICH

High Growth Scenario

Non-Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	202.9	221.7	257.7	344.8
Special forms of trading (£m)	17.4	17.4	17.4	17.4
Total available expenditure excl SFT (£m)	185.5	204.3	240.2	327.4
Turnover of stores in Droitwich (£m)	14.2	15.3	17.3	21.4
Market Share (of in-store sales)	7.7%	8.4%	8.4%	8.4%
Turnover potential (£m)	14.2	17.2	20.3	27.6
Expenditure capacity (£m)	0.0	1.9	3.0	6.3
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**1.9**	**3.0**	**6.3**
Theoretical floorspace based on £3,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**593**	**829**	**1392**

Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	90.5	98.9	114.9	153.8
Special forms of trading (£m)	3.3	3.3	3.3	3.3
Total available expenditure excl SFT (£m)	87.1	95.5	111.5	150.4
Turnover of stores in Droitwich (£m)	12.4	13.4	15.1	18.7
Market Share (of in-store sales)	14.3%	15.7%	15.7%	15.7%
Turnover potential (£m)	12.4	15.0	17.5	23.6
Expenditure capacity (£m)	0.0	1.6	2.4	4.9
Commitments:	4.1	4.7	5.4	6.7
Residual expenditure capacity (£m)	**-4.1**	**-3.1**	**-2.9**	**-1.8**
Theoretical floorspace based on £2,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**-1457**	**-1209**	**-584**

Combined Comparison Goods

	2006	*2012*	*2017*	*2026*
Floorspace Capacity		**-864**	**-380**	**807**

Notes

Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - 1.5% per annum. Post 2012 2.4% per annum (source: Experian Retail Planner 8.1)
It is assumed that there will be a 10% increase in the 2006 market share by 2012
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments
Commitment: Extant consent for bulky goods non-food retail development at Kidderminster Road - Assumed net sales 2,044sq.m. (80% of 2,555sq.m.gross) and assumed sales density is £2,000/sq.m.
Sales density of new floorspace is DPDS estimate
2005 prices

TABLE 21a: COMPARISON GOODS EXPENDITURE CAPACITY - PERSHORE

Low Growth Scenario

Non-Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	202.9	221.7	257.7	344.8
Special forms of trading (£m)	17.4	17.4	17.4	17.4
Total available expenditure excl SFT (£m)	185.5	204.3	240.2	327.4
Turnover of stores in Pershore (£m)	10.3	11.0	12.4	15.4
Market Share (of in-store sales)	5.5%	5.5%	5.5%	5.5%
Turnover potential (£m)	10.3	11.3	13.3	18.1
Expenditure capacity (£m)	0.0	0.3	0.8	2.7
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**0.3**	**0.8**	**2.7**
Theoretical floorspace based on £3,250/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**71**	**215**	**555**

Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	90.5	98.9	114.9	153.8
Special forms of trading (£m)	3.3	3.3	3.3	3.3
Total available expenditure excl SFT (£m)	87.1	95.5	111.5	150.4
Turnover of stores in Pershore (£m)	2.5	2.7	3.0	3.7
Market Share (of in-store sales)	2.8%	2.8%	2.8%	2.8%
Turnover potential (£m)	2.5	2.7	3.2	4.3
Expenditure capacity (£m)	0.0	0.0	0.2	0.6
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**0.0**	**0.2**	**0.6**
Theoretical floorspace based on £2,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**22**	**69**	**185**

Combined Comparison Goods

	2006	*2012*	*2017*	*2026*
Floorspace Capacity	**0**	**93**	**283**	**740**

Notes

Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - 1.5% per annum. Post 2012 2.4% per annum (source: Experian Retail Planner 8.1)
Market share is 2006 market share held as a constant
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments
Sales density of new floorspace is DPDS estimate
2005 prices

TABLE 21b: COMPARISON GOODS EXPENDITURE CAPACITY - PERSHORE

High Growth Scenario

Non-Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	202.9	221.7	257.7	344.8
Special forms of trading (£m)	17.4	17.4	17.4	17.4
Total available expenditure excl SFT (£m)	185.5	204.3	240.2	327.4
Turnover of stores in Pershore (£m)	10.3	11.0	12.4	15.4
Market Share (of in-store sales)	5.5%	6.1%	6.1%	6.1%
Turnover potential (£m)	10.3	12.4	14.6	19.9
Expenditure capacity (£m)	0.0	1.4	2.2	4.5
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**1.4**	**2.2**	**4.5**
Theoretical floorspace based on £3,250/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**394**	**551**	**925**

Bulky Goods

	2007	*2012*	*2017*	*2026*
Total available expenditure in the Study Area (£m)	90.5	98.9	114.9	153.8
Special forms of trading (£m)	3.3	3.3	3.3	3.3
Total available expenditure excl SFT (£m)	87.1	95.5	111.5	150.4
Turnover of stores in Pershore (£m)	2.5	2.7	3.0	3.7
Market Share (of in-store sales)	2.8%	3.1%	3.1%	3.1%
Turnover potential (£m)	2.5	3.0	3.5	4.7
Expenditure capacity (£m)	0.0	0.3	0.5	1.0
Commitments:				
Residual expenditure capacity (£m)	**0.0**	**0.3**	**0.5**	**1.0**
Theoretical floorspace based on £2,000/sq.m. sales density assumption (rising by 2.4% per annum post 2012)		**148**	**199**	**327**

Combined Comparison Goods

	2006	*2012*	*2017*	*2026*
Floorspace Capacity	**0**	**542**	**751**	**1253**

Notes

Special Forms of Trading - taken from household survey held constant - see report.
Assumed increase in floorspace efficiencies: 2007 - 2012 - 1.5% per annum. Post 2012 2.4% per annum (source: Experian Retail Planner 8.1)
It is assumed that there will be a 10% increase in the 2006 market share by 2012
Expenditure capacity is the difference between the turnover potential (based on maintaining the current market share)
and the current turnover (taking into account floorspace efficiency increase), making allowances for overtrading and commitments
Sales density of new floorspace is DPDS estimate
2005 prices

Table 22: Summary of Retail Expenditure Capacity

	Low Growth Scenario		High Growth Scenario	
Evesham				
Convenience Goods	***(£m)***	***(sq.m.net)***	***(£m)***	***(sq.m.net)***
2012	-3.3	-334.4	0.6	56
2017	-1.1	-103	3.1	300
2026	5.1	476	9.8	910
Comparison Goods	***(£m)***	***(sq.m.net)***	***(£m)***	***(sq.m.net)***
2012	-26.9	-6090	-17.5	-3087
2017	-25.5	-5252	-15.3	-1825
2026	-19.4	-3225	-5.6	1239
Droitwich				
Convenience Goods	***(£m)***	***(sq.m.net)***	***(£m)***	***(sq.m.net)***
2012	-12.0	-1196	-10.3	-1035
2017	-11.0	-1074	-9.3	-907
2026	-8.4	-787	-6.5	-607
Comparison Goods	***(£m)***	***(sq.m.net)***	***(£m)***	***(sq.m.net)***
2012	0.3	-2009	-1.2	-864
2017	-3.3	-1596	0.1	-380
2026	0.1	-598	4.5	807
Pershore				
Convenience Goods	***(£m)***	***(sq.m.net)***	***(£m)***	***(sq.m.net)***
2012	-14.1	-1409	-11.4	-1144
2017	-13.7	-1338	-10.9	-1064
2026	-12.7	-1184	-9.5	-889
Comparison Goods	***(£m)***	***(sq.m.net)***	***(£m)***	***(sq.m.net)***
2012	0.3	93	1.7	542
2017	1.0	283	2.7	751
2026	3.3	740	5.5	1253