

**TABLE 1: STUDY AREA POPULATION**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	34092	34267	35339	36410
Evesham Zone	47254	47495	48981	50466
Pershore Zone	26051	26184	27003	27822
<b>Total</b>	<b>107397</b>	<b>107946</b>	<b>111322</b>	<b>114698</b>

## Notes:

Population figures based on 2003 estimates from Experian

Projected forward to 2011 using District based forecasts from Worcestershire County Councils

Projected forward beyond 2011 using ONS trend-based projections for Wychavon District

**TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE (£)**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	1531	1578	1626	1675
Evesham Zone	1534	1581	1629	1678
Pershore Zone	1608	1656	1707	1759

## Notes:

2003 based expenditure data from Experian

Growth rate: 0.6%p.a. (Source: Experian)

2003 prices

**TABLE 3: TOTAL CONVENIENCE GOODS EXPENDITURE (£m)**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	52.2	54.1	57.4	61.0
Evesham Zone	72.5	75.1	79.8	82.7
Pershore Zone	41.9	43.4	46.1	47.8
<b>Total</b>	<b>166.6</b>	<b>172.5</b>	<b>183.3</b>	<b>191.5</b>

Notes:

2003 prices

**TABLE 4: MAIN FOOD SHOPPING**

	Droitwich Zone		Evesham Zone		Persore Zone		Total	
	%	£m	%	£m	%	£m	%	£m
Somerfield, High Street, EVESHAM	0.0%	0.0	4.3%	2.2	0.4%	0.1	<b>2.0%</b>	<b>2.3</b>
Iceland, High Street, EVESHAM	0.0%	0.0	1.7%	0.8	0.4%	0.1	<b>0.8%</b>	<b>1.0</b>
M&S, Riverside Centre, EVESHAM	0.0%	0.0	1.2%	0.6	0.4%	0.1	<b>0.6%</b>	<b>0.7</b>
Tesco, Worcester Road, EVESHAM	0.3%	0.1	55.5%	28.2	34.6%	10.1	<b>33.0%</b>	<b>38.4</b>
Morrisons, Four Pools, EVESHAM	0.0%	0.0	25.8%	13.1	6.0%	1.8	<b>12.7%</b>	<b>14.9</b>
Local Stores, EVESHAM	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Co-op, High Street, PERSHORE	0.0%	0.0	0.2%	0.1	9.8%	2.9	<b>2.6%</b>	<b>3.0</b>
Somerfield, Racecourse Road, PERSHORE	0.0%	0.0	0.2%	0.1	10.7%	3.1	<b>2.8%</b>	<b>3.3</b>
Costcutter, Hurst Road, PERSHORE	0.0%	0.0	0.0%	0.0	0.4%	0.1	<b>0.1%</b>	<b>0.1</b>
Local Stores, PERSHORE	0.3%	0.1	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Morrisons, St Andrews Centre, DROITWICH	33.0%	12.1	0.0%	0.0	1.3%	0.4	<b>10.7%</b>	<b>12.4</b>
Waitrose, Saltway, DROITWICH	16.0%	5.8	0.0%	0.0	1.3%	0.4	<b>5.3%</b>	<b>6.2</b>
Other Town Centre, DROITWICH	0.3%	0.1	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Worcester	26.0%	9.5	0.5%	0.2	19.7%	5.8	<b>13.3%</b>	<b>15.5</b>
Bromsgrove	16.0%	5.8	0.0%	0.0	0.4%	0.1	<b>5.1%</b>	<b>6.0</b>
Redditch	2.7%	1.0	1.9%	1.0	3.8%	1.1	<b>2.6%</b>	<b>3.1</b>
Cheltenham	0.0%	0.0	1.9%	1.0	1.7%	0.5	<b>1.3%</b>	<b>1.5</b>
Tewkesbury	0.0%	0.0	0.0%	0.0	2.6%	0.8	<b>0.6%</b>	<b>0.8</b>
Kidderminster	2.0%	0.7	0.0%	0.0	0.0%	0.0	<b>0.6%</b>	<b>0.7</b>
Malvern	0.3%	0.1	0.0%	0.0	2.1%	0.6	<b>0.6%</b>	<b>0.7</b>
Broadway	0.0%	0.0	1.0%	0.5	0.0%	0.0	<b>0.4%</b>	<b>0.5</b>
Alcester	0.0%	0.0	0.5%	0.2	0.9%	0.3	<b>0.4%</b>	<b>0.5</b>
Birmingham	0.3%	0.1	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Bidford on Avon	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Bishops Cleeve	0.0%	0.0	0.5%	0.2	0.9%	0.3	<b>0.4%</b>	<b>0.5</b>
Gloucester	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Merry Hill	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Stratford upon Avon	0.3%	0.1	0.7%	0.4	0.9%	0.3	<b>0.6%</b>	<b>0.7</b>
Upton upon Severn	0.0%	0.0	0.0%	0.0	0.9%	0.3	<b>0.2%</b>	<b>0.3</b>
Reading	0.3%	0.1	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Witney	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Other	0.3%	0.1	0.5%	0.2	0.0%	0.0	<b>0.3%</b>	<b>0.4</b>
Internet / mail order	1.7%	0.6	2.4%	1.2	0.9%	0.3	<b>1.8%</b>	<b>2.1</b>
<b>Total</b>	<b>100%</b>	<b>36.5</b>	<b>100%</b>	<b>50.8</b>	<b>100%</b>	<b>29.3</b>	<b>100%</b>	<b>116.6</b>

**Notes**

Assumed 70% of total convenience goods expenditure is spent at main-food shopping destination

**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%	2.1	1.0%	0.1	<b>4.6%</b>	<b>2.3</b>
Iceland, High Street, EVESHAM	0.0%	0.0	4.9%	1.1	1.0%	0.1	<b>2.4%</b>	<b>1.2</b>
M&S, Riverside Centre, EVESHAM	0.0%	0.0	8.2%	1.8	2.0%	0.3	<b>4.1%</b>	<b>2.0</b>
Other Town Centre, EVESHAM	0.0%	0.0	0.3%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Tesco, Worcester Road, EVESHAM	0.0%	0.0	19.2%	4.2	9.0%	1.1	<b>10.6%</b>	<b>5.3</b>
Morrisons, Four Pools, EVESHAM	0.0%	0.0	20.4%	4.4	2.5%	0.3	<b>9.5%</b>	<b>4.8</b>
Co-op, Davies Road, EVESHAM	0.0%	0.0	2.7%	0.6	0.0%	0.0	<b>1.2%</b>	<b>0.6</b>
Local Stores, EVESHAM	0.0%	0.0	8.2%	1.8	0.5%	0.1	<b>3.7%</b>	<b>1.9</b>
Co-op, High Street, PERSHORE	0.0%	0.0	0.3%	0.1	24.4%	3.1	<b>6.3%</b>	<b>3.1</b>
Somerfield, Racecourse Road, PERSHORE	0.0%	0.0	0.0%	0.0	10.4%	1.3	<b>2.6%</b>	<b>1.3</b>
Costcutter, Hurst Road, PERSHORE	0.0%	0.0	0.0%	0.0	2.0%	0.3	<b>0.5%</b>	<b>0.3</b>
Local Stores, PERSHORE	0.0%	0.0	0.0%	0.0	12.9%	1.6	<b>3.3%</b>	<b>1.6</b>
Morrisons, St Andrews Centre, DROITWICH	31.3%	4.9	0.0%	0.0	1.0%	0.1	<b>10.1%</b>	<b>5.0</b>
Waitrose, Saltway, DROITWICH	12.6%	2.0	0.0%	0.0	1.5%	0.2	<b>4.3%</b>	<b>2.2</b>
Other Town Centre, DROITWICH	0.0%	0.0	0.0%	0.0	0.0%	0.0	<b>0.0%</b>	<b>0.0</b>
Local Stores, DROITWICH	32.4%	5.1	0.0%	0.0	1.5%	0.2	<b>10.5%</b>	<b>5.3</b>
Broadway	0.0%	0.0	7.6%	1.7	0.0%	0.0	<b>3.3%</b>	<b>1.7</b>
Badsley	0.0%	0.0	2.1%	0.5	0.0%	0.0	<b>0.9%</b>	<b>0.5</b>
Hampton	0.0%	0.0	2.1%	0.5	0.0%	0.0	<b>0.9%</b>	<b>0.5</b>
Ombersley	2.3%	0.4	0.0%	0.0	0.0%	0.0	<b>0.7%</b>	<b>0.4</b>
Eckington	0.0%	0.0	0.0%	0.0	2.5%	0.3	<b>0.6%</b>	<b>0.3</b>
Harvington	0.0%	0.0	1.2%	0.3	0.0%	0.0	<b>0.5%</b>	<b>0.3</b>
Drakes Broughton	0.0%	0.0	0.3%	0.1	1.5%	0.2	<b>0.5%</b>	<b>0.3</b>
Inkberrow	0.0%	0.0	0.0%	0.0	1.5%	0.2	<b>0.4%</b>	<b>0.2</b>
Honeybourne	0.0%	0.0	0.9%	0.2	0.0%	0.0	<b>0.4%</b>	<b>0.2</b>
Stoke Prior	1.1%	0.2	0.0%	0.0	0.0%	0.0	<b>0.4%</b>	<b>0.2</b>
Littleton	0.0%	0.0	0.9%	0.2	0.0%	0.0	<b>0.4%</b>	<b>0.2</b>
Salford Priors	0.0%	0.0	0.6%	0.1	0.0%	0.0	<b>0.3%</b>	<b>0.1</b>
Lower Moor	0.0%	0.0	0.0%	0.0	0.5%	0.1	<b>0.1%</b>	<b>0.1</b>
Offenham	0.0%	0.0	0.6%	0.1	0.0%	0.0	<b>0.3%</b>	<b>0.1</b>
Willersley	0.0%	0.0	0.6%	0.1	0.0%	0.0	<b>0.3%</b>	<b>0.1</b>
Breferton	0.0%	0.0	0.3%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Cutnall Green	0.4%	0.1	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Worcester	5.0%	0.8	0.3%	0.1	12.4%	1.6	<b>4.8%</b>	<b>2.4</b>
Bromsgrove	9.5%	1.5	0.0%	0.0	0.0%	0.0	<b>3.0%</b>	<b>1.5</b>
Redditch	0.4%	0.1	0.9%	0.2	3.5%	0.4	<b>1.4%</b>	<b>0.7</b>
Alcester	0.0%	0.0	1.8%	0.4	2.5%	0.3	<b>1.4%</b>	<b>0.7</b>
Other Outside Survey Area	4.2%	0.7	5.5%	1.2	6.0%	0.8	<b>5.2%</b>	<b>2.6</b>
Internet / mail order	0.0%	0.0	0.3%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
<b>Total</b>	<b>100%</b>	<b>15.66</b>	<b>100%</b>	<b>21.8</b>	<b>100%</b>	<b>12.6</b>	<b>100.0%</b>	<b>50.0</b>

## Notes

Assumed that 30% of total convenience goods expenditure is spent at top-up shopping destination

**TABLE 6: COMBINED FOOD SHOPPING**

	Droitwich Zone		Evesham Zone		Persnore Zone		Total	
	%	£m	%	£m	%	£m	%	£m
Somerfield, High Street, EVESHAM	0.2%	0.1	5.9%	4.2	0.6%	0.3	<b>2.8%</b>	<b>4.6</b>
Iceland, High Street, EVESHAM	0.0%	0.0	2.6%	1.9	0.6%	0.3	<b>1.3%</b>	<b>2.2</b>
M&S, Riverside Centre, EVESHAM	0.0%	0.0	3.3%	2.4	0.9%	0.4	<b>1.7%</b>	<b>2.8</b>
Other Town Centre, EVESHAM	0.0%	0.0	0.1%	0.1	0.0%	0.0	<b>0.0%</b>	<b>0.1</b>
Tesco, Worcester Road, EVESHAM	0.2%	0.1	44.7%	32.3	26.9%	11.3	<b>26.3%</b>	<b>43.7</b>
Morrisons, Four Pools, EVESHAM	0.0%	0.0	24.3%	17.6	4.9%	2.1	<b>11.8%</b>	<b>19.6</b>
Co-op, Davies Road, EVESHAM	0.0%	0.0	0.8%	0.6	0.0%	0.0	<b>0.4%</b>	<b>0.6</b>
Local Stores, EVESHAM	0.2%	0.1	2.5%	1.8	0.1%	0.1	<b>1.2%</b>	<b>2.0</b>
Co-op, High Street, PERSHORE	0.0%	0.0	0.3%	0.2	14.2%	5.9	<b>3.7%</b>	<b>6.1</b>
Somerfield, Racecourse Road, PERSHORE	0.0%	0.0	0.2%	0.1	10.6%	4.4	<b>2.7%</b>	<b>4.6</b>
Costcutter, Hurst Road, PERSHORE	0.0%	0.0	0.0%	0.0	0.9%	0.4	<b>0.2%</b>	<b>0.4</b>
Local Stores, PERSHORE	0.2%	0.1	0.0%	0.0	3.9%	1.6	<b>1.0%</b>	<b>1.7</b>
Morrisons, St Andrews Centre, DROITWICH	32.4%	17.0	0.0%	0.0	1.2%	0.5	<b>10.5%</b>	<b>17.5</b>
Waitrose, Saltway, DROITWICH	14.9%	7.8	0.0%	0.0	1.3%	0.6	<b>5.0%</b>	<b>8.4</b>
Other Town Centre, DROITWICH	0.2%	0.1	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Local Stores, DROITWICH	9.7%	5.1	0.0%	0.0	0.4%	0.2	<b>3.2%</b>	<b>5.3</b>
Broadway	0.0%	0.0	3.0%	2.1	0.0%	0.0	<b>1.3%</b>	<b>2.1</b>
Badsley	0.0%	0.0	0.6%	0.5	0.0%	0.0	<b>0.3%</b>	<b>0.5</b>
Hampton	0.0%	0.0	0.6%	0.5	0.0%	0.0	<b>0.3%</b>	<b>0.5</b>
Ombersley	0.7%	0.4	0.0%	0.0	0.0%	0.0	<b>0.2%</b>	<b>0.4</b>
Eckington	0.0%	0.0	0.0%	0.0	0.7%	0.3	<b>0.2%</b>	<b>0.3</b>
Harvington	0.0%	0.0	0.4%	0.3	0.0%	0.0	<b>0.2%</b>	<b>0.3</b>
Drakes Broughton	0.0%	0.0	0.1%	0.1	0.4%	0.2	<b>0.2%</b>	<b>0.3</b>
Inkberrow	0.0%	0.0	0.0%	0.0	0.4%	0.2	<b>0.1%</b>	<b>0.2</b>
Honeybourne	0.0%	0.0	0.3%	0.2	0.0%	0.0	<b>0.1%</b>	<b>0.2</b>
Stoke Prior	0.3%	0.2	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.2</b>
Littleton	0.0%	0.0	0.3%	0.2	0.0%	0.0	<b>0.1%</b>	<b>0.2</b>
Salford Priors	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Lower Moor	0.0%	0.0	0.0%	0.0	0.1%	0.1	<b>0.0%</b>	<b>0.1</b>
Offenham	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Willersley	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Bretforton	0.0%	0.0	0.1%	0.1	0.0%	0.0	<b>0.0%</b>	<b>0.1</b>
Cutnall Green	0.1%	0.1	0.0%	0.0	0.0%	0.0	<b>0.0%</b>	<b>0.1</b>
Worcester	19.6%	10.3	0.4%	0.3	17.5%	7.3	<b>10.8%</b>	<b>17.9</b>
Bromsgrove	14.0%	7.3	0.0%	0.0	0.3%	0.1	<b>4.5%</b>	<b>7.5</b>
Redditch	2.0%	1.0	1.6%	1.2	3.7%	1.6	<b>2.3%</b>	<b>3.8</b>
Alcester	0.0%	0.0	0.9%	0.6	1.3%	0.6	<b>0.7%</b>	<b>1.2</b>
Other Outside Survey Area	3.8%	2.0	4.8%	3.5	8.1%	3.4	<b>5.3%</b>	<b>8.9</b>
Internet / Mail Order	1.2%	0.6	1.8%	1.3	0.6%	0.3	<b>1.3%</b>	<b>2.1</b>
<b>Total</b>	<b>100%</b>	<b>52.3</b>	<b>100%</b>	<b>72.4</b>	<b>100%</b>	<b>41.9</b>	<b>100%</b>	<b>166.6</b>

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

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	2724	3251	3880	4631
Evesham Zone	2700	3222	3845	4589
Pershore Zone	2920	3485	4159	4963

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

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	1889	2255	2691	3211
Evesham Zone	1870	2232	2664	3179
Pershore Zone	2007	2395	2859	3412

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

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	835	997	1189	1419
Evesham Zone	830	990	1181	1410
Pershore Zone	913	1089	1300	1552

## Notes:

2003 based expenditure data from Experian  
 Growth rate: 3.6%p.a. (Source: Experian)

2003 prices

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

	2006	2011	2016	2021
Droitwich Zone	701	836	998	1191
Evesham Zone	677	808	964	1151
Pershore Zone	712	849	1014	1210

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

	2006	2011	2016	2021
Droitwich Zone	1189	1419	1693	2020
Evesham Zone	1193	1424	1699	2028
Pershore Zone	1295	1546	1845	2202

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

	2006	2011	2016	2021
Droitwich Zone	202	242	288	344
Evesham Zone	208	248	296	353
Pershore Zone	246	293	350	418

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

	2006	2011	2016	2021
Droitwich Zone	70	84	100	119
Evesham Zone	69	82	98	117
Pershore Zone	71	85	101	121

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

	2006	2011	2016	2021
Droitwich Zone	225	268	320	382
Evesham Zone	218	260	310	370
Pershore Zone	241	288	344	410

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

	2006	2011	2016	2021
Droitwich Zone	338	403	481	575
Evesham Zone	335	399	477	569
Pershore Zone	355	423	505	603

## Notes:

2003 based expenditure data from Experian  
Growth rate: 3.6%p.a. (Source: Experian)

2003 prices



**TABLE 8a: COMPARISON GOODS EXPENDITURE (£m)**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	92.9	111.4	141.3	168.6
Evesham Zone	127.6	153.0	194.1	231.6
Pershore Zone	76.1	91.2	115.7	138.1
<b>Total</b>	<b>296.5</b>	<b>355.7</b>	<b>451.0</b>	<b>538.3</b>

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

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	64.4	77.3	98.0	116.9
Evesham Zone	88.4	106.0	134.4	160.4
Pershore Zone	52.3	62.7	79.5	94.9
<b>Total</b>	<b>205.1</b>	<b>246.0</b>	<b>311.9</b>	<b>372.3</b>

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

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Droitwich Zone	28.5	34.2	43.3	51.7
Evesham Zone	39.2	47.0	59.6	71.2
Pershore Zone	23.8	28.5	36.2	43.2
<b>Total</b>	<b>91.4</b>	<b>109.7</b>	<b>139.1</b>	<b>166.0</b>

Notes:  
2003 prices

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

	2006	2011	2016	2021
Droitwich Zone	23.9	28.6	36.3	43.4
Evesham Zone	32.0	38.4	48.7	58.1
Pershore Zone	18.5	22.2	28.2	33.7
<b>Total</b>	<b>74.4</b>	<b>89.3</b>	<b>113.2</b>	<b>135.1</b>

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

	2006	2011	2016	2021
Droitwich Zone	40.5	48.6	61.6	73.6
Evesham Zone	56.4	67.6	85.8	102.3
Pershore Zone	33.7	40.5	51.3	61.3
<b>Total</b>	<b>130.6</b>	<b>156.7</b>	<b>198.7</b>	<b>237.2</b>

**TABLE 8f: DIY GOODS EXPENDITURE (£m)**

	2006	2011	2016	2021
Droitwich Zone	6.9	8.3	10.5	12.5
Evesham Zone	9.8	11.8	14.9	17.8
Pershore Zone	6.4	7.7	9.7	11.6
<b>Total</b>	<b>23.1</b>	<b>27.7</b>	<b>35.2</b>	<b>42.0</b>

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

	2006	2011	2016	2021
Droitwich Zone	2.4	2.9	3.6	4.3
Evesham Zone	3.3	3.9	5.0	5.9
Pershore Zone	1.9	2.2	2.8	3.4
<b>Total</b>	<b>7.5</b>	<b>9.0</b>	<b>11.4</b>	<b>13.6</b>

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

	2006	2011	2016	2021
Droitwich Zone	7.7	9.2	11.6	13.9
Evesham Zone	10.3	12.4	15.7	18.7
Pershore Zone	6.3	7.5	9.6	11.4
<b>Total</b>	<b>24.2</b>	<b>29.1</b>	<b>36.9</b>	<b>44.0</b>

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

	2006	2011	2016	2021
Droitwich Zone	11.5	13.8	17.5	20.9
Evesham Zone	15.8	19.0	24.1	28.7
Pershore Zone	9.2	11.1	14.1	16.8
<b>Total</b>	<b>36.6</b>	<b>43.9</b>	<b>55.6</b>	<b>66.4</b>

Notes:  
2003 prices

**TABLE 9: CLOTHING, SHOES & FASHION GOODS**

	Droitwich Zone		Evesham Zone		Persnore Zone		Total	
	%	£m	%	£m	%	£m	%	£m
Evesham Town Centre	0.3%	0.1	31.3%	10.0	9.7%	1.8	<b>16.0%</b>	<b>11.9</b>
Droitwich Town Centre	18.5%	4.4	0.0%	0.0	0.4%	0.1	<b>6.0%</b>	<b>4.5</b>
Persnore Town Centre	0.7%	0.2	1.6%	0.5	20.3%	3.8	<b>6.0%</b>	<b>4.4</b>
Tesco, Evesham	0.0%	0.0	0.0%	0.0	0.8%	0.2	<b>0.2%</b>	<b>0.2</b>
Broadway	0.0%	0.0	0.5%	0.1	0.0%	0.0	<b>0.2%</b>	<b>0.1</b>
Worcester	47.5%	11.4	9.2%	2.9	41.9%	7.8	<b>29.7%</b>	<b>22.1</b>
Cheltenham	0.7%	0.2	26.0%	8.3	9.3%	1.7	<b>13.7%</b>	<b>10.2</b>
Stratford upon Avon	0.3%	0.1	13.3%	4.3	1.3%	0.2	<b>6.2%</b>	<b>4.6</b>
Redditch	3.6%	0.9	3.9%	1.3	3.0%	0.5	<b>3.6%</b>	<b>2.7</b>
Birmingham	4.3%	1.0	1.8%	0.6	1.3%	0.2	<b>2.5%</b>	<b>1.8</b>
Bromsgrove	5.0%	1.2	0.0%	0.0	0.0%	0.0	<b>1.6%</b>	<b>1.2</b>
Kidderminster	4.6%	1.1	0.2%	0.1	0.0%	0.0	<b>1.6%</b>	<b>1.2</b>
Malvern	1.7%	0.4	0.5%	0.1	1.7%	0.3	<b>1.1%</b>	<b>0.9</b>
Merry Hill Birmingham	2.3%	0.6	0.0%	0.0	0.0%	0.0	<b>0.7%</b>	<b>0.6</b>
Solihull	1.0%	0.2	0.2%	0.1	0.0%	0.0	<b>0.4%</b>	<b>0.3</b>
London	0.0%	0.0	0.7%	0.2	0.4%	0.1	<b>0.4%</b>	<b>0.3</b>
Weston-super-Mare	0.3%	0.1	0.5%	0.1	0.4%	0.1	<b>0.4%</b>	<b>0.3</b>
Swindon	0.0%	0.0	0.5%	0.1	0.8%	0.2	<b>0.4%</b>	<b>0.3</b>
Tewkesbury	0.0%	0.0	0.2%	0.1	1.3%	0.2	<b>0.4%</b>	<b>0.3</b>
Dudley	0.7%	0.2	0.2%	0.1	0.0%	0.0	<b>0.3%</b>	<b>0.2</b>
Tamworth	0.3%	0.1	0.5%	0.1	0.0%	0.0	<b>0.3%</b>	<b>0.2</b>
Bristol	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Gloucester	0.0%	0.0	0.2%	0.1	0.0%	0.0	<b>0.1%</b>	<b>0.1</b>
Abroad	0.3%	0.1	0.5%	0.1	2.5%	0.5	<b>0.9%</b>	<b>0.7</b>
Others (outside survey area)	4.0%	0.9	3.2%	1.0	0.8%	0.2	<b>2.9%</b>	<b>2.1</b>
Internet / mail order / catalogue	4.0%	0.9	4.8%	1.5	3.8%	0.7	<b>4.3%</b>	<b>3.2</b>
Total	100%	23.9	100%	32.0	100%	18.5	<b>100%</b>	<b>74.4</b>

**TABLE 10: DIY GOODS**

	Droitwich Zone		Evesham Zone		Persnore Zone		Total	
	%	£m	%	£m	%	£m	%	£m
Evesham Town Centre	0.0%	0.00	12.0%	1.18	5.4%	0.34	<b>6.6%</b>	<b>1.5</b>
Droitwich Town Centre	14.3%	0.99	0.0%	0.00	0.4%	0.03	<b>4.4%</b>	<b>1.0</b>
Persnore Town Centre	0.0%	0.00	0.3%	0.02	5.8%	0.37	<b>1.7%</b>	<b>0.4</b>
B&Q, Four Pools, Evesham	0.0%	0.00	46.4%	4.56	30.0%	1.92	<b>28.0%</b>	<b>6.5</b>
Focus, Four Pools, Evesham	0.0%	0.00	29.1%	2.86	11.2%	0.72	<b>15.5%</b>	<b>3.6</b>
Jewson, Four Pools, Evesham	0.0%	0.00	0.3%	0.02	0.0%	0.00	<b>0.1%</b>	<b>0.0</b>
Various Stores, Four Pools, Evesham	0.0%	0.00	3.0%	0.30	2.7%	0.17	<b>2.0%</b>	<b>0.5</b>
Tesco, Evesham	0.0%	0.00	0.3%	0.02	0.0%	0.00	<b>0.1%</b>	<b>0.0</b>
Homebase, Roman Way Retail Park, Droitwich	50.5%	3.49	0.0%	0.00	1.3%	0.09	<b>15.4%</b>	<b>3.6</b>
Local Stores, Droitwich	0.7%	0.05	0.0%	0.00	0.0%	0.00	<b>0.2%</b>	<b>0.0</b>
Broadway	0.0%	0.00	1.8%	0.17	0.0%	0.00	<b>0.7%</b>	<b>0.2</b>
Worcester	15.0%	1.03	0.0%	0.00	28.7%	1.84	<b>12.4%</b>	<b>2.9</b>
Redditch	5.2%	0.36	2.0%	0.20	7.6%	0.49	<b>4.5%</b>	<b>1.0</b>
Kidderminster	7.7%	0.53	0.0%	0.00	0.9%	0.06	<b>2.5%</b>	<b>0.6</b>
Cheltenham	0.0%	0.00	2.3%	0.22	2.7%	0.17	<b>1.7%</b>	<b>0.4</b>
Bromsgrove	3.5%	0.24	0.0%	0.00	0.0%	0.00	<b>1.0%</b>	<b>0.2</b>
Stratford upon Avon	0.0%	0.00	1.3%	0.12	0.4%	0.03	<b>0.7%</b>	<b>0.2</b>
Birmingham	0.3%	0.02	0.3%	0.02	0.4%	0.03	<b>0.3%</b>	<b>0.1</b>
Stourport	1.0%	0.07	0.0%	0.00	0.0%	0.00	<b>0.3%</b>	<b>0.1</b>
Other (outside survey area)	0.7%	0.05	1.0%	0.10	1.8%	0.11	<b>1.1%</b>	<b>0.3</b>
Internet / mail order / catalogue	1.0%	0.07	0.3%	0.02	0.4%	0.03	<b>0.5%</b>	<b>0.1</b>
<b>Total</b>	<b>100%</b>	<b>6.9</b>	<b>100%</b>	<b>9.8</b>	<b>100%</b>	<b>6.4</b>	<b>100%</b>	<b>23.1</b>

**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%	6.4	16.3%	1.5	<b>21.7%</b>	<b>7.9</b>
Droitwich Town Centre	24.9%	2.9	0.6%	0.1	2.0%	0.2	<b>8.6%</b>	<b>3.1</b>
Pershore Town Centre	0.4%	0.04	1.1%	0.2	11.9%	1.1	<b>3.6%</b>	<b>1.3</b>
B&Q, Four Pools, Evesham	0.0%	0.0	3.1%	0.5	0.0%	0.0	<b>1.3%</b>	<b>0.5</b>
Focus, Four Pools, Evesham	0.0%	0.0	2.5%	0.4	0.5%	0.05	<b>1.2%</b>	<b>0.4</b>
Evesham Industrial Estate	0.0%	0.0	0.8%	0.1	0.0%	0.0	<b>0.4%</b>	<b>0.1</b>
Other Shops, Four Pools, Evesham	0.4%	0.04	3.3%	0.5	2.5%	0.2	<b>2.2%</b>	<b>0.8</b>
DFS, Roman Way RP, Droitwich	5.7%	0.7	0.0%	0.0	0.0%	0.0	<b>1.8%</b>	<b>0.7</b>
Homebase, Roman Way RP, Droitwich	0.8%	0.1	0.0%	0.0	0.0%	0.0	<b>0.2%</b>	<b>0.1</b>
Broadway	0.0%	0.0	0.3%	0.04	0.0%	0.0	<b>0.1%</b>	<b>0.04</b>
Blackminster	0.0%	0.0	0.8%	0.1	0.5%	0.05	<b>0.5%</b>	<b>0.2</b>
Worcester	38.9%	4.5	6.1%	1.0	40.1%	3.7	<b>25.0%</b>	<b>9.2</b>
Cheltenham	0.0%	0.0	20.0%	3.2	6.9%	0.6	<b>10.4%</b>	<b>3.8</b>
Kidderminster	9.4%	1.1	0.0%	0.0	3.5%	0.3	<b>3.8%</b>	<b>1.4</b>
Stratford upon Avon	0.0%	0.0	6.4%	1.0	0.5%	0.05	<b>2.9%</b>	<b>1.1</b>
Birmingham	2.3%	0.3	2.8%	0.4	3.0%	0.3	<b>2.7%</b>	<b>1.0</b>
Bromsgrove	6.8%	0.8	0.0%	0.0	0.5%	0.05	<b>2.3%</b>	<b>0.8</b>
Redditch	1.5%	0.2	2.2%	0.4	2.5%	0.2	<b>2.1%</b>	<b>0.8</b>
Bristol	0.4%	0.04	0.8%	0.1	1.5%	0.1	<b>0.9%</b>	<b>0.3</b>
Alcester	0.0%	0.0	1.7%	0.3	0.5%	0.05	<b>0.8%</b>	<b>0.3</b>
Malvern	0.0%	0.0	0.6%	0.1	1.5%	0.1	<b>0.6%</b>	<b>0.2</b>
Gloucester	0.0%	0.0	1.1%	0.2	0.0%	0.0	<b>0.5%</b>	<b>0.2</b>
Tewkesbury	0.0%	0.0	0.6%	0.1	1.0%	0.1	<b>0.5%</b>	<b>0.2</b>
Wednesbury	0.4%	0.04	0.8%	0.1	0.0%	0.0	<b>0.5%</b>	<b>0.2</b>
Ikea, Wednesbury	0.8%	0.1	0.0%	0.0	0.5%	0.05	<b>0.4%</b>	<b>0.1</b>
Merry Hill, Birmingham	0.8%	0.1	0.0%	0.0	0.0%	0.0	<b>0.2%</b>	<b>0.1</b>
Other (outside survey area)	3.8%	0.4	2.2%	0.4	1.5%	0.1	<b>2.5%</b>	<b>0.9</b>
Internet / mail order / catalogue	2.6%	0.3	1.9%	0.3	3.0%	0.3	<b>2.4%</b>	<b>0.9</b>
<b>Total</b>	<b>100%</b>	<b>11.5</b>	<b>100%</b>	<b>15.8</b>	<b>100%</b>	<b>9.2</b>	<b>100%</b>	<b>36.6</b>

**TABLE 12: LARGE ELECTRICAL GOODS**

	Droitwich Zone		Evesham Zone		Persnore Zone		Total	
	%	£m	%	£m	%	£m	%	£m
Evesham Town Centre	0.3%	0.01	68.7%	2.2	13.4%	0.2	<b>33.2%</b>	<b>2.5</b>
Droitwich Town centre	18.0%	0.4	0.0%	0.0	1.3%	0.02	<b>6.1%</b>	<b>0.5</b>
Persnore Town Centre	0.0%	0.0	0.2%	0.01	4.9%	0.1	<b>1.3%</b>	<b>0.1</b>
Other, Evesham	0.0%	0.0	1.2%	0.04	0.4%	0.01	<b>0.7%</b>	<b>0.05</b>
Miller Bros, Roman Way RP, Droitwich	24.1%	0.6	0.0%	0.0	2.2%	0.04	<b>8.2%</b>	<b>0.6</b>
Other, Droitwich	0.3%	0.01	0.0%	0.0	0.0%	0.0	<b>0.1%</b>	<b>0.01</b>
Worcester	40.0%	1.0	4.0%	0.1	54.0%	1.0	<b>27.8%</b>	<b>2.1</b>
Cheltenham	0.0%	0.0	10.9%	0.4	4.5%	0.1	<b>5.9%</b>	<b>0.4</b>
Redditch	3.1%	0.1	2.0%	0.1	4.0%	0.1	<b>2.8%</b>	<b>0.2</b>
Stratford upon Avon	0.0%	0.0	3.2%	0.1	0.4%	0.01	<b>1.5%</b>	<b>0.1</b>
Bromsgrove	3.4%	0.1	0.0%	0.0	0.4%	0.01	<b>1.2%</b>	<b>0.1</b>
Bristol / Cribbs Causeway	0.0%	0.0	0.2%	0.01	2.7%	0.05	<b>0.8%</b>	<b>0.1</b>
Others (outside study area)	4.7%	0.1	2.0%	0.1	4.5%	0.1	<b>3.5%</b>	<b>0.3</b>
Internet / mail order / catalogue	6.1%	0.1	7.5%	0.2	7.1%	0.1	<b>7.0%</b>	<b>0.5</b>
<b>Total</b>	<b>100%</b>	<b>2.4</b>	<b>100%</b>	<b>3.3</b>	<b>100%</b>	<b>1.9</b>	<b>100%</b>	<b>7.5</b>

**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%	6.5	19.5%	1.2	<b>32.1%</b>	<b>7.8</b>
Droitwich Town Centre	19.3%	1.5	0.0%	0.0	2.4%	0.1	<b>6.7%</b>	<b>1.6</b>
Pershore Town Centre	0.0%	0.0	0.5%	0.1	10.0%	0.6	<b>2.8%</b>	<b>0.7</b>
Bond Industrial Estate, Evesham	0.0%	0.0	0.5%	0.1	0.0%	0.0	<b>0.2%</b>	<b>0.1</b>
Tesco, Evesham	0.0%	0.0	4.0%	0.4	2.4%	0.1	<b>2.3%</b>	<b>0.6</b>
B&Q, Four Pools, Evesham	0.0%	0.0	0.3%	0.03	0.0%	0.0	<b>0.1%</b>	<b>0.03</b>
Other Stores, Evesham	0.0%	0.0	1.9%	0.2	1.0%	0.1	<b>1.0%</b>	<b>0.3</b>
Miller Bros, Roman Way RP, Droitwich	15.3%	1.2	0.0%	0.0	1.4%	0.1	<b>5.2%</b>	<b>1.3</b>
Other Stores, Droitwich	1.1%	0.1	0.0%	0.0	0.0%	0.0	<b>0.3%</b>	<b>0.1</b>
Broadway	0.0%	0.0	0.3%	0.03	0.0%	0.0	<b>0.1%</b>	<b>0.03</b>
Worcester	34.9%	2.7	2.1%	0.2	36.2%	2.3	<b>21.3%</b>	<b>5.2</b>
Cheltenham	0.7%	0.1	9.8%	1.0	4.3%	0.3	<b>5.5%</b>	<b>1.3</b>
Redditch	2.2%	0.2	2.1%	0.2	4.3%	0.3	<b>2.7%</b>	<b>0.7</b>
Stratford upon Avon	0.4%	0.03	4.0%	0.4	0.5%	0.03	<b>1.9%</b>	<b>0.5</b>
Birmingham	1.5%	0.1	2.4%	0.2	1.4%	0.1	<b>1.8%</b>	<b>0.4</b>
Bromsgrove	5.5%	0.4	0.0%	0.0	0.5%	0.03	<b>1.8%</b>	<b>0.4</b>
Malvern	0.7%	0.1	0.0%	0.0	4.8%	0.3	<b>1.5%</b>	<b>0.4</b>
Kidderminster	3.6%	0.3	0.0%	0.0	0.0%	0.0	<b>1.1%</b>	<b>0.3</b>
Solihull	1.1%	0.1	0.3%	0.03	0.5%	0.03	<b>0.6%</b>	<b>0.1</b>
Abroad	1.1%	0.1	0.0%	0.0	0.0%	0.0	<b>0.3%</b>	<b>0.1</b>
Other (outside study area)	2.2%	0.2	1.9%	0.2	4.8%	0.3	<b>2.7%</b>	<b>0.7</b>
Internet / mail order / catalogue	9.8%	0.8	6.9%	0.7	6.2%	0.4	<b>7.6%</b>	<b>1.9</b>
<b>Total</b>	<b>100%</b>	<b>7.7</b>	<b>100%</b>	<b>10.3</b>	<b>100%</b>	<b>6.3</b>	<b>100%</b>	<b>24.2</b>

**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%	27.3	10.3%	3.5	<b>23.8%</b>	<b>31.1</b>
Droitwich Town Centre	20.4%	8.2	0.0%	0.0	1.5%	0.5	<b>6.7%</b>	<b>8.7</b>
Pershore Town Centre	0.4%	0.1	0.5%	0.3	16.2%	5.5	<b>4.5%</b>	<b>5.9</b>
Tesco, Worcester Road, Evesham	0.0%	0.0	4.3%	2.4	3.9%	1.3	<b>2.9%</b>	<b>3.8</b>
Morrisons, Four Pools, Evesham	0.0%	0.0	0.3%	0.2	0.0%	0.0	<b>0.1%</b>	<b>0.2</b>
Morrisons, Droitwich	1.8%	0.7	0.0%	0.0	0.5%	0.2	<b>0.7%</b>	<b>0.9</b>
Broadway	0.0%	0.0	0.3%	0.2	0.0%	0.0	<b>0.1%</b>	<b>0.2</b>
Worcester	49.6%	20.1	6.5%	3.7	38.2%	12.9	<b>28.1%</b>	<b>36.7</b>
Cheltenham	0.0%	0.0	17.3%	9.8	7.4%	2.5	<b>9.4%</b>	<b>12.3</b>
Stratford upon Avon	0.0%	0.0	7.6%	4.3	1.5%	0.5	<b>3.7%</b>	<b>4.8</b>
Redditch	2.5%	1.0	1.9%	1.1	3.4%	1.2	<b>2.5%</b>	<b>3.2</b>
Bromsgrove	6.1%	2.5	0.0%	0.0	0.0%	0.0	<b>1.9%</b>	<b>2.5</b>
Birmingham	2.9%	1.2	0.5%	0.3	1.5%	0.5	<b>1.5%</b>	<b>2.0</b>
Merry Hill, Birmingham	3.6%	1.4	0.3%	0.2	0.0%	0.0	<b>1.2%</b>	<b>1.6</b>
Kidderminster	1.1%	0.4	0.0%	0.0	0.0%	0.0	<b>0.3%</b>	<b>0.4</b>
Tewkesbury	0.0%	0.0	0.5%	0.3	1.0%	0.3	<b>0.5%</b>	<b>0.6</b>
Other (outside study area)	1.4%	0.6	1.1%	0.6	1.0%	0.3	<b>1.2%</b>	<b>1.5</b>
Internet / mail order / catalogue	9.6%	3.9	10.3%	5.8	13.7%	4.6	<b>11.0%</b>	<b>14.3</b>
<b>Total</b>	<b>100%</b>	<b>40.5</b>	<b>100%</b>	<b>56.4</b>	<b>100%</b>	<b>33.7</b>	<b>100%</b>	<b>130.6</b>



**TABLE 15: BENCHMARK AND SURVEY-DERIVED TURNOVERS OF LARGE FOODSTORES IN CHELTENHAM**

	Sales Area	Convenience Goods Sales Area	Typical Sales Density (Convenience Goods)	Benchmark Turnover	Survey Derived Turnover	Difference	
	sq.m.net	sq.m.net	sq.m.net	(£m)	(£m)	£m	%
<b><i>Evesham</i></b>							
Tesco	4265	2986	14161	42.3	43.7	1.5	3
Morrisons	2880	2304	10718	24.7	19.6	-5.1	-21
Somerfield	1187	1068	5832	6.2	4.6	-1.6	-26
M&S	650	585	9962	5.8	2.8	-3.1	-52
Iceland	250	225	4867	1.1	2.2	1.1	97
Evesham Total				80.1	72.9	-7.2	-9
<b><i>Droitwich</i></b>							
Morrisons	1788	1520	10718	16.3	19.6	3.3	20
Waitrose	2011	1810	10277	18.6	8.4	-10.2	-55
Droitwich Total				34.9	28.0	-6.9	-20
<b><i>Pershore</i></b>							
Co-op	1475	1328	5775	7.7	6.1	-1.5	-20
Somerfield	791	712	5832	4.2	4.6	0.4	10
Pershore Total				11.8	10.7	-1.1	-9

## 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

2003 prices

**TABLE 16a: CONVENIENCE GOODS EXPENDITURE CAPACITY - EVESHAM**  
**Low Growth Scenario**

	2006	2011	2016	2021
Total available expenditure in the Study Area (£m)	166.6	172.5	183.3	191.5
Special forms of trading (£m)	2.1	10.7	11.9	12.4
Total available expenditure excl SFT (£m)	164.4	161.8	171.4	179.0
Turnover of stores in Evesham (£m)	75.5	78.4	81.4	84.5
Market Share (of in-store sales)	46%	46%	46%	46%
Turnover potential (£m)	75.5	74.3	78.7	82.2
Overtrading/Undertrading (£m)	-7.2	-7.2	-7.2	-7.2
<b>Expenditure capacity (£m)</b>	<b>-7.2</b>	<b>-11.3</b>	<b>-9.9</b>	<b>-9.5</b>

Notes

Forecasts for Special Forms of Trading based on Figures from  
 Experian Retail Planner Briefing Note 2.3D Table 6.2

Assumed increase in floorspace efficiencies: 0.75% per annum (source: Experian)

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)

2003 prices

**TABLE 16b: CONVENIENCE GOODS EXPENDITURE CAPACITY - EVESHAM**  
**High Growth Scenario**

	2006	2011	2016	2021
Total available expenditure in the Study Area (£m)	166.6	172.5	183.3	191.5
Special forms of trading (£m)	2.1	7.4	7.9	8.2
Total available expenditure excl SFT (£m)	164.4	165.1	175.4	183.2
Turnover of stores in Evesham (£m)	75.5	77.5	79.4	81.4
Market Share (of in-store sales)	46%	48%	48%	48%
Turnover potential (£m)	75.5	79.6	84.6	88.4
Overtrading/Undertrading (£m)	-7.2	-7.2	-7.2	-7.2
<b>Expenditure capacity (£m)</b>	<b>-7.2</b>	<b>-5.0</b>	<b>-2.0</b>	<b>-0.3</b>

Notes

Forecasts for Special Forms of Trading based on Figures from

Experian Retail Planner Briefing Note 2.3D Table 6.4

Assumed increase in floorspace efficiencies: 0.5% per annum

It is assumed that there will be a 5% increase in the 2006 market share by 2011

Expenditure capacity is the difference between the turnover potential (based on assumed market share)

and the current turnover (taking into account floorspace efficiency increase)

2003 prices

**TABLE 17a: CONVENIENCE GOODS EXPENDITURE CAPACITY - DROITWICH****Low Growth Scenario**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	166.6	172.5	183.3	191.5
Special forms of trading (£m)	2.1	10.7	11.9	12.4
Total available expenditure excl SFT (£m)	164.4	161.8	171.4	179.0
Turnover of stores in Droitwich (£m)	31.2	32.4	33.7	34.9
Market Share (of in-store sales)	19%	19%	19%	19%
Turnover potential (£m)	31.2	30.7	32.6	34.0
Overtrading/Undertrading (£m)	-6.9	-6.9	-6.9	-6.9
Commitment: Morrisons Extension (£m)	1.6	1.6	1.6	1.6
<b>Expenditure capacity (£m)</b>	<b>-8.5</b>	<b>-10.2</b>	<b>-9.6</b>	<b>-9.5</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from

Experian Retail Planner Briefing Note 2.3D Table 6.2

Assumed increase in floorspace efficiencies: 0.75% per annum (source: Experian)

Market share is 2006 market share held as a constant

Morrisons extension assumed to trade at 30% of existing sales density

Expenditure capacity is the difference between the turnover potential (based on assumed market share) and the current turnover (taking into account floorspace efficiency increase)

2003 prices

**TABLE 17b: CONVENIENCE GOODS EXPENDITURE CAPACITY - DROITWICH**  
**High Growth Scenario**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	166.6	172.5	183.3	191.5
Special forms of trading (£m)	2.1	7.4	7.9	8.2
Total available expenditure excl SFT (£m)	164.4	165.1	175.4	183.2
Turnover of stores in Droitwich (£m)	31.2	32.0	32.8	33.7
Market Share (of in-store sales)	19%	20%	20%	20%
Turnover potential (£m)	31.2	32.9	35.0	36.5
Overtrading/Undertrading (£m)	-6.9	-6.9	-6.9	-6.9
Commitment: Morrisons Extension (£m)	1.6	1.6	1.6	1.6
<b>Expenditure capacity (£m)</b>	<b>-8.5</b>	<b>-7.6</b>	<b>-6.4</b>	<b>-5.7</b>

Notes

Forecasts for Special Forms of Trading based on Figures from  
 Experian Retail Planner Briefing Note 2.3D Table 6.4

Assumed increase in floorspace efficiencies: 0.5% per annum

It is assumed that there will be a 5% increase in the 2006 market share by 2011

Morrisons extension assumed to trade at 30% of existing sales density

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)

2003 prices

**TABLE 18a: CONVENIENCE GOODS EXPENDITURE CAPACITY - PERSHORE****Low Growth Scenario**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	166.6	172.5	183.3	191.5
Special forms of trading (£m)	2.1	10.7	11.9	12.4
Total available expenditure excl SFT (£m)	164.4	161.8	171.4	179.0
Turnover of stores in Pershore (£m)	12.8	13.3	13.8	14.3
Market Share (of in-store sales)	8%	8%	8%	8%
Turnover potential (£m)	12.8	12.6	13.4	14.0
Overtrading/Undertrading (£m)	-1.1	-1.1	-1.1	-1.1
<b>Expenditure capacity (£m)</b>	<b>-1.1</b>	<b>-1.8</b>	<b>-1.6</b>	<b>-1.5</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from

Experian Retail Planner Briefing Note 2.3D Table 6.2

Assumed increase in floorspace efficiencies: 0.75% per annum (source: Experian)

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)

2003 prices

**TABLE 18b: CONVENIENCE GOODS EXPENDITURE CAPACITY - PERSHORE****High Growth Scenario**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	166.6	172.5	183.3	191.5
Special forms of trading (£m)	2.1	7.4	7.9	8.2
Total available expenditure excl SFT (£m)	164.4	165.1	175.4	183.2
Turnover of stores in Pershore (£m)	12.8	13.1	13.5	13.8
Market Share (of in-store sales)	8%	9%	9%	9%
Turnover potential (£m)	12.8	15.4	16.4	17.1
Overtrading/Undertrading (£m)	-1.1	-1.1	-1.1	-1.1
<b>Expenditure capacity (£m)</b>	<b>-1.1</b>	<b>1.2</b>	<b>1.8</b>	<b>2.2</b>
<b>Theoretical floorspace based on £10,000/sq.m. sales density assumption (sq.m.net)</b>		<b>118</b>	<b>182</b>	<b>220</b>
<b>Theoretical floorspace based on £5,000/sq.m. sales density assumption (sq.m.net)</b>		<b>236</b>	<b>363</b>	<b>441</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from  
Experian Retail Planner Briefing Note 2.3D Table 6.4

Assumed increase in floorspace efficiencies: 0.5% per annum

It is assumed that there will be a 20% increase in the 2006 market share by 2011

Expenditure capacity is the difference between the turnover potential (based on  
assumed market share)

and the current turnover (taking into account floorspace efficiency increase)

2003 prices

**TABLE 19a: COMPARISON GOODS EXPENDITURE CAPACITY - EVESHAM****Low Growth Scenario****Non-Bulky Goods**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	205.1	246.0	311.9	372.3
Special forms of trading (£m)	17.5	29.5	38.7	46.2
Total available expenditure excl SFT (£m)	187.5	216.5	273.3	326.1
Turnover of stores in Evesham (£m)	47.1	52.6	58.8	65.7
Market Share (of in-store sales)	25%	25%	25%	25%
Turnover potential (£m)	47.1	54.3	68.6	81.9
Expenditure capacity (£m)	0.0	1.7	9.8	16.1
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>1.7</b>	<b>9.8</b>	<b>16.1</b>
<b>Theoretical floorspace based on £4,000/sq.m. sales density assumption</b>		<b>432</b>	<b>2448</b>	<b>4035</b>

**Bulky Goods**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	91.4	109.7	139.1	166.0
Special forms of trading (£m)	3.4	13.2	17.2	20.6
Total available expenditure excl SFT (£m)	88.1	96.5	121.9	145.4
Turnover of stores in Evesham (£m)	33.1	37.0	41.3	46.2
Market Share (of in-store sales)	38%	38%	38%	38%
Turnover potential (£m)	33.1	36.3	45.8	54.7
Expenditure capacity (£m)	0.0	-0.7	4.5	8.4
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>-0.7</b>	<b>4.5</b>	<b>8.4</b>
<b>Theoretical floorspace based on £2,000/sq.m. sales density assumption</b>			<b>2226</b>	<b>4222</b>

**Combined Comparison Goods**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
<b>Floorspace Capacity</b>		<b>432</b>	<b>4673</b>	<b>8257</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from Experian Retail Planner Briefing Note 2.3D Table 6.2

Assumed increase in floorspace efficiencies: 2.25% per annum (source: Experian)

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)

Sales density of new floorspace is DPDS estimate

2003 prices



**TABLE 19b: COMPARISON GOODS EXPENDITURE CAPACITY - EVESHAM****High Growth Scenario****Non-Bulky Goods**

	2006	2011	2016	2021
Total available expenditure in the Study Area (£m)	205.1	246.0	311.9	372.3
Special forms of trading (£m)	17.5	21.4	27.1	32.4
Total available expenditure excl SFT (£m)	187.5	224.6	284.8	339.9
Turnover of stores in Evesham (£m)	47.1	52.0	57.4	63.4
Market Share (of in-store sales)	25.1%	27.6%	27.6%	27.6%
Turnover potential (£m)	47.1	62.0	78.7	93.9
Expenditure capacity (£m)	0.0	10.0	21.3	30.5
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>10.0</b>	<b>21.3</b>	<b>30.5</b>
<b>Theoretical floorspace based on £4,000/sq.m. sales density assumption</b>		<b>2511</b>	<b>5315</b>	<b>7625</b>

**Bulky Goods**

	2006	2011	2016	2021
Total available expenditure in the Study Area (£m)	91.4	109.7	139.1	166.0
Special forms of trading (£m)	3.4	9.5	12.1	14.4
Total available expenditure excl SFT (£m)	88.1	100.2	127.0	151.6
Turnover of stores in Evesham (£m)	33.1	36.5	40.3	44.5
Market Share (of in-store sales)	38%	41%	41%	41%
Turnover potential (£m)	33.1	41.4	52.5	62.7
Expenditure capacity (£m)	0.0	4.9	12.2	18.1
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>4.9</b>	<b>12.2</b>	<b>18.1</b>
<b>Theoretical floorspace based on £2,000/sq.m. sales density assumption</b>		<b>2431</b>	<b>6079</b>	<b>9057</b>

**Combined Comparison Goods**

	2006	2011	2016	2021
<b>Floorspace Capacity</b>		<b>4942</b>	<b>11394</b>	<b>16682</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from Experian Retail Planner Briefing Note 2.3D Table 6.4

Assumed increase in floorspace efficiencies: 2% per annum (source: Experian)

It is assumed that there will be a 10% increase in the 2006 market share by 2011

Expenditure capacity is the difference between the turnover potential (based on assumed market share) and the current turnover (taking into account floorspace efficiency increase)

Sales density of new floorspace is DPDS estimate

2003 prices

**TABLE 20a: COMPARISON GOODS EXPENDITURE CAPACITY - DROITWICH****Low Growth Scenario****Non-Bulky Goods**

	2006	2011	2016	2021
Total available expenditure in the Study Area (£m)	205.1	246.0	311.9	372.3
Special forms of trading (£m)	17.5	29.5	38.7	46.2
Total available expenditure excl SFT (£m)	187.5	216.5	273.3	326.1
Turnover of stores in Droitwich (£m)	14.1	15.8	17.6	19.7
Market Share (of in-store sales)	7.5%	7.5%	7.5%	7.5%
Turnover potential (£m)	14.1	16.3	20.6	24.6
Expenditure capacity (£m)	0.0	0.5	2.9	4.8
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>0.5</b>	<b>2.9</b>	<b>4.8</b>
<b>Theoretical floorspace based on £3,000/sq.m. sales density assumption</b>		<b>173</b>	<b>979</b>	<b>1614</b>

**Bulky Goods**

	2006	2011	2016	2021
Total available expenditure in the Study Area (£m)	91.4	109.7	139.1	166.0
Special forms of trading (£m)	3.4	13.2	17.2	20.6
Total available expenditure excl SFT (£m)	88.1	96.5	121.9	145.4
Turnover of stores in Droitwich (£m)	12.6	14.0	15.7	17.5
Market Share (of in-store sales)	14.3%	14.3%	14.3%	14.3%
Turnover potential (£m)	12.6	13.8	17.4	20.7
Expenditure capacity (£m)	0.0	-0.3	1.7	3.2
Commitments:	4.1	4.1	4.1	4.1
<b>Residual expenditure capacity (£m)</b>	<b>-4.1</b>	<b>-4.4</b>	<b>-2.4</b>	<b>-0.9</b>
<b>Theoretical floorspace based on £2,000/sq.m. sales density assumption</b>				

**Combined Comparison Goods**

	2006	2011	2016	2021
<b>Floorspace Capacity</b>		<b>173</b>	<b>979</b>	<b>1614</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from Experian Retail Planner Briefing Note 2.3D Table 6.2

Assumed increase in floorspace efficiencies: 2.25% per annum (source: Experian)

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)

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

2003 prices

**TABLE 20b: COMPARISON GOODS EXPENDITURE CAPACITY - DROITWICH****High Growth Scenario**

<b>Non-Bulky Goods</b>					<b>Bulky Goods</b>				
	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>		<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	205.1	246.0	311.9	372.3	Total available expenditure in the Study Area (£m)	91.4	109.7	139.1	166.0
Special forms of trading (£m)	17.5	21.4	27.1	32.4	Special forms of trading (£m)	3.4	9.5	12.1	14.4
Total available expenditure excl SFT (£m)	187.5	224.6	284.8	339.9	Total available expenditure excl SFT (£m)	88.1	100.2	127.0	151.6
Turnover of stores in Droitwich (£m)	14.1	15.6	17.2	19.0	Turnover of stores in Droitwich (£m)	12.6	13.9	15.3	16.9
Market Share (of in-store sales)	7.5%	8.3%	8.3%	8.3%	Market Share (of in-store sales)	14.3%	15.7%	15.7%	15.7%
Turnover potential (£m)	14.1	18.6	23.6	28.2	Turnover potential (£m)	12.6	15.7	19.9	23.8
Expenditure capacity (£m)	0.0	3.0	6.4	9.2	Expenditure capacity (£m)	0.0	1.8	4.6	6.9
Commitments:					Commitments:	4.1	4.1	4.1	4.1
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>3.0</b>	<b>6.4</b>	<b>9.2</b>	<b>Residual expenditure capacity (£m)</b>	<b>-4.1</b>	<b>-2.2</b>	<b>0.5</b>	<b>2.8</b>
<b>Theoretical floorspace based on £3,000/sq.m. sales density assumption</b>		<b>1005</b>	<b>2127</b>	<b>3051</b>	<b>Theoretical floorspace based on £2,000/sq.m. sales density assumption</b>			<b>263</b>	<b>1394</b>
<b>Combined Comparison Goods</b>									
	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>					
<b>Floorspace Capacity</b>		<b>1005</b>	<b>2390</b>	<b>4445</b>					

## Notes

Forecasts for Special Forms of Trading based on Figures from

Experian Retail Planner Briefing Note 2.3D Table 6.4

Assumed increase in floorspace efficiencies: 2% per annum (source: Experian)

It is assumed that there will be a 10% increase in the 2006 market share by 2011

Expenditure capacity is the difference between the turnover potential (based on assumed market share)

and the current turnover (taking into account floorspace efficiency increase)

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

2003 prices

**TABLE 21a: COMPARISON GOODS EXPENDITURE CAPACITY - PERSHORE****Low Growth Scenario****Non-Bulky Goods**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	205.1	246.0	311.9	372.3
Special forms of trading (£m)	17.5	29.5	38.7	46.2
Total available expenditure excl SFT (£m)	187.5	216.5	273.3	326.1
Turnover of stores in Pershore (£m)	10.4	11.6	12.9	14.5
Market Share (of in-store sales)	5.5%	5.5%	5.5%	5.5%
Turnover potential (£m)	10.4	12.0	15.1	18.0
Expenditure capacity (£m)	0.0	0.4	2.2	3.5
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>0.4</b>	<b>2.2</b>	<b>3.5</b>
<b>Theoretical floorspace based on £3,500/sq.m. sales density assumption</b>		<b>108</b>	<b>615</b>	<b>1014</b>

**Bulky Goods**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	91.4	109.7	139.1	166.0
Special forms of trading (£m)	3.4	13.2	17.2	20.6
Total available expenditure excl SFT (£m)	88.1	96.5	121.9	145.4
Turnover of stores in Pershore (£m)	2.5	2.8	3.1	3.5
Market Share (of in-store sales)	2.8%	2.8%	2.8%	2.8%
Turnover potential (£m)	2.5	2.7	3.5	4.1
Expenditure capacity (£m)	0.0	-0.1	0.3	0.6
Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>-0.1</b>	<b>0.3</b>	<b>0.6</b>
<b>Theoretical floorspace based on £2,000/sq.m. sales density assumption</b>			<b>168</b>	<b>319</b>

**Combined Comparison Goods**

	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
<b>Floorspace Capacity</b>	<b>0</b>	<b>108</b>	<b>783</b>	<b>1333</b>

## Notes

Forecasts for Special Forms of Trading based on Figures from  
Experian Retail Planner Briefing Note 2.3D Table 6.2

Assumed increase in floorspace efficiencies: 2.25% per annum (source: Experian)

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)

Sales density of new floorspace is DPDS estimate

2003 prices

**TABLE 21b: COMPARISON GOODS EXPENDITURE CAPACITY - PERSHORE**  
**High Growth Scenario**

<b>Non-Bulky Goods</b>					<b>Bulky Goods</b>				
	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>		<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
Total available expenditure in the Study Area (£m)	205.1	246.0	311.9	372.3	Total available expenditure in the Study Area (£m)	91.4	109.7	139.1	166.0
Special forms of trading (£m)	17.5	21.4	27.1	32.4	Special forms of trading (£m)	3.4	9.5	12.1	14.4
Total available expenditure excl SFT (£m)	187.5	224.6	284.8	339.9	Total available expenditure excl SFT (£m)	88.1	100.2	127.0	151.6
Turnover of stores in Pershore (£m)	10.4	11.4	12.6	13.9	Turnover of stores in Pershore (£m)	2.5	2.8	3.0	3.4
Market Share (of in-store sales)	5.5%	6.1%	6.1%	6.1%	Market Share (of in-store sales)	2.8%	3.1%	3.1%	3.1%
Turnover potential (£m)	10.4	13.6	17.3	20.6	Turnover potential (£m)	2.5	3.1	4.0	4.7
Expenditure capacity (£m)	0.0	2.2	4.7	6.7	Expenditure capacity (£m)	0.0	0.4	0.9	1.4
Commitments:					Commitments:				
<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>2.2</b>	<b>4.7</b>	<b>6.7</b>	<b>Residual expenditure capacity (£m)</b>	<b>0.0</b>	<b>0.4</b>	<b>0.9</b>	<b>1.4</b>
<b>Theoretical floorspace based on £3,500/sq.m. sales density assumption</b>		<b>631</b>	<b>1336</b>	<b>1916</b>	<b>Theoretical floorspace based on £2,000/sq.m. sales density assumption</b>		<b>183</b>	<b>459</b>	<b>683</b>
<b>Combined Comparison Goods</b>									
	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>					
<b>Floorspace Capacity</b>	<b>0</b>	<b>814</b>	<b>1794</b>	<b>2600</b>					

**Notes**

Forecasts for Special Forms of Trading based on Figures from Experian Retail Planner Briefing Note 2.3D Table 6.4

Assumed increase in floorspace efficiencies: 2% per annum (source: Experian)

It is assumed that there will be a 10% increase in the 2006 market share by 2011

Expenditure capacity is the difference between the turnover potential (based on assumed market share) and the current turnover (taking into account floorspace efficiency increase)

Sales density of new floorspace is DPDS estimate

2003 prices

Table 22: Summary of Retail Expenditure Capacity

	Low Growth Scenario		High Growth Scenario	
<b>Evesham</b>				
<b>Convenience Goods</b>	<b>(£m)</b>	<b>(sq.m.net)</b>	<b>(£m)</b>	<b>(sq.m.net)</b>
2011	-11.3		-5.0	
2016	-9.9		-2.0	
2021	-9.5		-0.3	
<b>Comparison Goods</b>	<b>(£m)</b>	<b>(sq.m.net)</b>	<b>(£m)</b>	<b>(sq.m.net)</b>
2011	1.7	432	14.9	4942
2016	14.2	4673	33.4	11394
2021	24.6	8257	48.6	16682
<b>Droitwich</b>				
<b>Convenience Goods</b>	<b>(£m)</b>	<b>(sq.m.net)</b>	<b>(£m)</b>	<b>(sq.m.net)</b>
2011	-10.2		-7.6	
2016	-9.6		-6.4	
2021	-9.5		-5.7	
<b>Comparison Goods</b>	<b>(£m)</b>	<b>(sq.m.net)</b>	<b>(£m)</b>	<b>(sq.m.net)</b>
2011	0.5	173	0.8	1005
2016	0.5	979	6.9	2390
2021	4.0	1614	11.9	4445
<b>Pershore</b>				
<b>Convenience Goods</b>	<b>(£m)</b>	<b>(sq.m.net)</b>	<b>(£m)</b>	<b>(sq.m.net)</b>
2011	-1.8		1.2	236
2016	-1.6		1.8	363
2021	-1.5		2.2	441
<b>Comparison Goods</b>	<b>(£m)</b>	<b>(sq.m.net)</b>	<b>(£m)</b>	<b>(sq.m.net)</b>
2011	0.4	108	2.6	814
2016	2.5	783	5.6	1794
2021	4.2	1333	8.1	2600