

BROMSGROVE TOWN CENTRE FORECASTS

Scenario 1 - No change in Bromsgrove's Market Share

TABLE 3a
BROMSGROVE'S DRAW UPON THE CATCHMENT AREA.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO BROMSGROVE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (%)	2012 (%)	2017 (%)	2022 (%)	2007 (%)	2012 (%)	2017 (%)	2022 (%)
1	75	75	75	75	45	45	45	45
2	6	6	6	6	3	3	3	3
3	4	4	4	4	4	4	4	4
4	12	12	12	12	3	3	3	3
5	4	4	4	4	1	1	1	1

SOURCE: Tables 3a(i) and 3a(ii)

TABLE 4a
FORECAST RETAIL SALES IN BROMSGROVE (2004 prices)

Catchment zone	RETAIL SALES IN BROMSGROVE BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (£M)	2012 (£M)	2017 (£M)	2022 (£M)	2007 (£M)	2012 (£M)	2017 (£M)	2022 (£M)
1	85.4	90.7	96.8	103.3	104.1	133.8	172.6	222.5
2	18.0	19.3	20.7	21.8	17.7	23.0	29.8	38.7
3	6.3	6.7	7.1	7.4	13.2	16.9	21.7	27.9
4	8.6	9.2	10.0	10.5	3.8	5.0	6.5	8.4
5	4.2	4.4	4.6	4.7	2.1	0.0	3.5	4.4
TOTALS	122.4	130.3	139.2	147.8	141.0	178.6	234.0	301.9

SOURCE: Tables 2a & 3a

TABLE 5a
FUTURE SHOP FLOORSPACE CAPACITY TOWN IN BROMSGROVE

Catchment zone	RETAIL SALES IN BROMSGROVE BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (£M)	2012 (£M)	2017 (£M)	2022 (£M)	2007 (£M)	2012 (£M)	2017 (£M)	2022 (£M)
1	85.4	90.7	96.8	103.3	104.1	133.8	172.6	222.5
2	18.0	19.3	20.7	21.8	17.7	23.0	29.8	38.7
3	6.3	6.7	7.1	7.4	13.2	16.9	21.7	27.9
4	8.6	9.2	10.0	10.5	3.8	5.0	6.5	8.4
5	4.2	4.4	4.6	4.7	2.1	0.0	3.5	4.4
TOTALS	122.4	130.3	139.2	147.8	141.0	178.6	234.0	301.9

SOURCE: Table 4a, Table 5a (i), CB Richard Ellis

NOTES:

- Excludes vacant shops.
- Comparison goods gross floorspace and information on commitments based on information from the Council.
- Net floorspace calculated at 70/30 split.
- Indicative company average turnover for convenience calculated from average of 5 main foodstores.
- An indicative sales density for comparison goods has been estimated from the surrounding area and CB Richard Ellis knowledge of market conditions.
- No additional retail floorspace commitments have been identified in the study period.

TABLE 3a (i)
CONVENIENCE GOODS 2003

Expenditure Weighting:	ALLOCATIONS TO BROMSGROVE 2003		WEIGHTED AVERAGE
	Main Food Q1	Top-up convenience Q4	
	75	25	100
	(%)	(%)	(%)
1	76.2	71.9	75.1
2	6.2	7.2	6.5
3	4.9	1.4	4.0
4	13.9	5.9	11.9
5	3.9	2.6	3.6

TABLE 3a (ii)
COMPARISON GOODS 2004

Catchment Zones	ALLOCATIONS TO BROMSGROVE INDICATED BY THE HOUSEHOLD INTERVIEW SURVEY 2003										WEIGHTED AVERAGE
	Clothing & footwear Q5	Furniture/ florcvrgs Q6	Household Textiles Q7	Household Appliances Q8	Radio, TV HiFi, etc Q9	DIY goods & dectrtrs spls Q10	Chemists gds & cosmetics Q11	Books, jewelry, watches, recln Q12			
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	26.7	38.7	39.0	39.6	38.1	58.6	74.7	49.7	45.0		
2	2.8	7.1	1.5	3.0	1.7	3.0	1.4	5.2	3.3		
3	2.7	7.7	6.3	5.6	5.6	1.4	3.9	4.4	4.2		
4	3.8	1.6	3.1	2.9	4.5	0.0	5.0	0.0	2.6		
5	1.4	0.0	0.0	1.4	0.0	0.0	2.5	1.4	0.9		

SOURCE: Bromsgrove Household Interview Survey rebased to exclude "don't do", internet, catalogue & mail order; Table 4 MapInfo Area Profile Report for expenditure

TABLE 4a (i)
COMPARISON GOODS SALES IN BROMSGROVE BY GOODS TYPE 2004

Catchment Zones	ALLOCATIONS TO BROMSGROVE INDICATED BY HOUSEHOLD INTERVIEW SURVEY 2003									TOTAL
	Clothing & footwear (£M)	Furniture/ florcvrgs (£M)	Household Textiles (£M)	Household Appliances (£M)	Radio, TV HiFi, etc (£M)	DIY goods & dectrtrs spls (£M)	Chemists gds & cosmetics (£M)	Books, jewelry, watches, recln (£M)		
1	15.0	8.9	4.5	1.8	11.7	16.8	21.5	23.8	104.1	
2	3.7	3.8	0.4	0.3	1.5	2.0	0.9	5.1	17.7	
3	2.1	2.4	1.0	0.3	2.8	0.5	1.5	2.6	13.2	
4	1.3	0.2	0.2	0.1	1.0	0.0	0.9	0.0	3.8	
5	0.8	0.0	0.0	0.1	0.0	0.0	0.7	0.6	2.1	
TOTALS	22.8	15.3	6.1	2.6	17.0	19.3	25.6	32.2	141.0	
MARKET SHARES	6.5%	10.6%	8.4%	9.1%	7.5%	10.7%	14.1%	11.7%		

SOURCE: Tables 2b and 3a (ii)

Table 5a (i)
BROMSGROVE EXISTING PROVISION
MAIN FOODSTORES

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£M)
Morrisons, Buntsford Oak F	3,703	72	2,666	10,474	27.9
Asda, Market Street	3,815	49	1,869	16,251	30.4
Somerfield, High Street	910	77	701	6,522	4.6
Tesco Express	141	90	127	14,458	1.8
Iceland	855	90	770	4,820	3.7
Other, town centre	1,000	100	1,000	3,000	3.0
Other, outside town centre					15.5
ALL STORES & SHOPS	10,425	478	7,133	55,525	86.9

SOURCES: IGD Stores Database 2007, CB Richard Ellis 2007

NOTES: CB Richard Ellis estimated 1000sqm net of other town centre floorspace trading at a sales density of £3000 per sqm