

Wycombe Town Centres and Retail Study 2017 Addendum

Wycombe District Council

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1.0 **Introduction**

- 1.1 Lichfields (formerly trading Nathaniel Lichfield and Partners) was commissioned by Wycombe District Council to prepare a district wide town centre and retail study in 2004. The 2004 study was fully updated in a report dated February 2014. A partial update was prepared in May 2016.
- 1.2 In order to assess recent changes, Lichfields has been commissioned to further partial update based on the latest population and expenditure projections. This report should be read alongside the Wycombe Town Centres and Retail Study Update 2014 (WTCRSU 2014).
- 1.3 This partial update re-assesses the quantitative scope for new retail floorspace in Wycombe District up to 2033.
- 1.4 All monetary values expressed in this analysis are at 2014 prices unless stated otherwise. The WTCRSU 2014 was based on 2011 prices, and therefore the expenditure and turnover figures within the two reports are not directly comparable.

2.0 **Methodology and Base Data**

2.1 The quantitative analysis is based on a study area adopted in the WTCRSU 2014, see Appendix 1.

Consumer Expenditure

2.2 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2014 were obtained.

2.3 Expenditure projections per person for convenience and comparison goods are shown in Table 2 in Appendix 2 and 3, respectively.

Population

2.4 The baseline population scenario within the WTCRSU 2014 adopted Office of National Statistics (ONS) 2011-based projections for Wycombe District. The 2016 update considered two population growth scenarios i.e. the Objectively Assessment Need (OAN) plus 2,502 additional dwellings and a "constrained" growth assuming two thirds of the OAN projection.

2.5 For this 2017 update, mid-year population estimates for 2013 have been obtained for Wycombe District and Chiltern and South Bucks. For other authorities partly within the study area, The Office of National Statistics (ONS) 2014 Sub-National Population Projections (SNPP) have been adopted. Population projections beyond 2013 are based on 11,200 new dwellings in Wycombe District and 7,600 new homes in Chiltern/South Bucks (combined) between 2013 and 2033. The Buckinghamshire Housing and Economic Development Needs Assessment Update 2016 indicates the 10 year trend (2005 - 2015) will provided the following growth between 2013 and 2033:

2.6 Wycombe District = 10,923 new dwellings and a population increase of 19,090;

2.7 Chiltern/South Bucks = 11,291 new dwellings and a population increase of 20,918.

2.8 Population projections have been adjusted based on 2.37 people per dwelling i.e. Wycombe District's population has been increased by 656 at 2033 (277 additional dwellings) and the Chiltern/South Bucks 2033 population has been reduced by 8,748 people (3,691 fewer dwellings).

2.9 The revised population projections as shown in Table 1 in Appendix 2.

Available Spending

2.10 The levels of available spending are derived by combining the population in Table 1 with per capita spending figures Table 2 for convenience goods in Appendix 2 and comparison goods in Appendix 3.

2.11 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

2.12 Special Forms of Trading (SFT) and non-store activity is included within Experian's expenditure estimates, which includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. Experian provide projections for E-tailing and other SFT. These projections have been

used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace.

- 2.13 Based on Experian's latest data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 2.7% and 12.0% of total convenience and comparison goods expenditure respectively in 2015. The projections provided by Experian suggest that these percentages will increase to 5.1% and 16.4% by 2033.
- 2.14 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase from £528.94 million in 2014 to £558.99 million in 2033, as shown in Table 3 in Appendix 2.
- 2.15 Comparison goods spending is forecast to increase from £816.57 million in 2014 to £1,540.48 million in 2033, as shown in Table 3 in Appendix 3.

3.0 Capacity for Convenience Floorspace

- 3.1 The results of the household shopper questionnaire survey, undertaken by NEMS in October 2013 were used to estimate existing shopping patterns within the study area. The market shares/shopping patterns were adjusted to reflect recent developments/commitments. The adjusted market shares are shown Table 4 in Appendix 2.
- 3.2 Table 5 in Appendix 2 indicates that the level of convenience goods expenditure attracted to shops/stores in the Wycombe District in 2016 is estimated to be £412.44 million.
- 3.3 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Tables 10 and 11 in Appendix 2, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 3.4 The estimated convenience goods sales areas have been derived from ORC's StorePoint data (2017). Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.
- 3.5 Average sales densities are not widely available for smaller convenience shops, particularly independent retailers. An average sales density of £5,500 per sq.m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Wycombe District is £360.35 million (excluding local shopping facilities outside the main town and district centres).
- 3.6 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities (excluding local shops) in the District at 2016 is £401.17 million. These figures suggest that collectively convenience retail facilities in the District are trading 11.3% above national average levels in 2016.
- 3.7 The future level of available convenience goods expenditure at 2018, 2023, 2028 and 2033 is shown at Tables 6 to 9 in Appendix 2.
- 3.8 The total level of available convenience goods expenditure available for shops in Wycombe between 2016 and 2033 is summarised in Table 13 (Appendix 2). The benchmark turnover of existing convenience floorspace (Tables 10 and 11) and unimplemented food store commitments (Table 12) have been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.
- 3.9 The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 14 in Appendix 2. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores.
- 3.10 Unimplemented food store commitments are expected to about half of the current 2016 surplus convenience goods expenditure. Continued expenditure growth will generate an expenditure surplus of £29.20 million in 2023, increasing to £39.33 million in 2028 and £50.78 million in 2033.
- 3.11 The expenditure projections could support 2,433 sq.m net (3,476 sq.m gross) of convenience goods floorspace by 2023 in the District as a whole. The 2028 projection is 3,278 sq.m net (4,683 sq.m gross) and the 2033 projection is 4,232 sq.m net (6,045 sq.m gross).

- 3.12 The WTCRS 2014 (baseline scenario) was 5,188 sq.m net (7,411 sq.m gross) up to 2031. The updated figures are marginally lower, despite the later end year (2033 rather than 2031), due to Experian's lower expenditure projections for convenience goods.

4.0 Capacity for Comparison Floorspace

- 4.1 Wycombe District attracts £753.84 million of comparison goods expenditure in total in 2016 (Table 5 in Appendix 3). The future level of comparison goods expenditure available to shops in Wycombe District has been projected to 2018, 2023, 2028 and 2033, as shown in Tables 6 to 9 in Appendix 3.
- 4.2 Future available expenditure is compared with the projected turnover of existing comparison goods retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 10 in Appendix 3. The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 11.
- 4.3 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Table 10 therefore assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted as recommended by Experian.
- 4.4 Commitments and recent completions (since 2013) are expected to absorb expenditure growth up to and beyond 2018, but continued growth up to 2023 could support 2,136 sq.m net (2,848 sq.m gross) of comparison goods floorspace in the District as a whole. This will increase to 13,385 sq.m net (17,847 sq.m gross) in 2028 and 25,288 sq.m net (33,717 sq.m gross in 2033).
- 4.5 The WTCRS 2014 (baseline scenario) were marginally lower at 18,027 sq.m net (24,036 sq.m gross) up to 2031. The updated figures are slightly higher due to a number of factors, as follows:
- the later end year (2033 rather than 2031); and
 - higher population projections (254,180 at 2031 compared with 251,220 in the WTCRS).

5.0 Conclusions

- 5.1 This report provides an update of the District wide needs assessment for retail floorspace in Wycombe. The conclusions are summarised below.
- 5.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development and main town centre uses over the plan period.
- 5.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. A sequential approach to site selection should be adopted.
- 5.4 Long term floorspace capacity forecasts beyond 2023 are susceptible to change due to unforeseen circumstances. Long term projections beyond 2023 are not only subject to changes in terms of population growth, but also growth in expenditure per capita and growth in turnover efficiencies. Experian's recommended growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Small variations in Experian's recommended growth rates (i.e. published annually) can lead to large variations in floorspace capacity when projected over a long period, therefore long term projections must be treated with caution and kept under review, particularly projections between 2028 and 2033.
- 5.5 The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in Wycombe, for example the Westgate Shopping Centre redevelopment in Oxford and development at Broadway in Maidenhead.

Retail Floorspace Projections

- 5.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Wycombe. The projections take into account recent developments completed between 2013 and 2016 and unimplemented commitments as at 2016. New floorspace over and above commitments should be distributed as shown in Table 5.1 and Table 5.2. The floorspace projections in Tables 5.1 to 5.2 do not take into account the potential re-occupation of vacant shop units in High Wycombe town centre. The projections also assume the market share and role of each centre will remain unchanged in the future.

Table 5.1 Convenience Goods Floorspace Projections (Sq.M Gross)

Town	Completed Development	Commitments	Additional Floorspace SQ.M Gross (assuming net to gross ratio of 70%)			
			2013 -2016	at 2016	2016/23	2023/28
High Wycombe	4,800	1,500	2,500	1,000	1,000	4,500
Marlow	0	0	0	0	0	0
Princes Risborough	400	0	1,000	100	100	1,200
District Centres	900	600	100	100	0	200
Other Wycombe	0	0	0	100	0	100
TOTAL	6,100	2,100	3,600	1,300	1,100	6,000

Source: Completed commitments in High Wycombe see Table 10 in Appendix 2. Completed commitments in the rest of Wycombe District see Table 11. The additional floorspace projections are shown at the foot of Table 14 in Appendix 2.

Table 5.2 Comparison Goods Floorspace Projections (Sq.M Gross)

Town	Completed Development	Commitments	Additional Floorspace SQ.M Gross (assuming net to gross ratio of 75%)			
			2013 -2016	at 2016	2016/23	2023/28
High Wycombe	12,600	1,200	2,100	13,800	14,700	30,600
Marlow	0	0	400	600	600	1,600
Princes Risborough	0	0	200	300	300	800
District Centres	100	0	0	100	0	100
Other Wycombe	0	0	200	200	200	600
TOTAL	12,700	1,200	2,900	15,000	15,800	33,700

Source: Completed commitments see Table 10 in Appendix 3. The additional floorspace projections are shown at the foot of Table 11 in Appendix 3.

Accommodating Growth

- 5.7 Future retail development should be phased in accordance with the tables above. The identification of opportunities to meet the medium term floorspace projections up to 2023 should be the priority, including the potential to accommodate growth within vacant shop premises.

High Wycombe

- 5.8 The latest Goad Plan information (August 2016) indicate there is a high shop vacancy rate in High Wycombe town centre. Taking into account the recent opening of TK Maxx, which has occupied 4 vacant units within the Eden Shopping Centre, there are 73 vacant units within the town centre. The shop vacancy is 17.5% compared with the Goad national average of only 11.4%. Vacant shop units total 12,000 sq.m gross.
- 5.9 As indicated in the WTCRS 2014, a target vacancy rate in High Wycombe town centre could be around 7%, i.e. a typical pre-recession level for relatively successful centres. If this reduction in vacancy rate was achieved then 44 shop units would be re-occupied (around 7,000 sq.m gross). This could include the reoccupied of vacant units within the Chiltern Shopping Centre (14 units – 2,100 sq.m gross).
- 5.10 The combined comparison and convenience goods floorspace projection for High Wycombe is 4,600 sq.m gross up to 2023, increasing to 19,400 sq.m gross by 2028. If the reduction in vacant floorspace can be achieved then the re-occupied floorspace (7,000 sq.m gross) would exceeds the 2023 projection by 2,400 sq.m gross, which suggests there is no need to bring forward sites in High Wycombe, over and above commitments, in the short term to meet the projections up to 2023.
- 5.11 In the longer term, reoccupied vacant shop units (7,000 sq.m gross) could accommodate around 36% of the floorspace projection in High Wycombe up to 2028 (19,400 sq.m gross), which would leave 12,400 sq.m gross.
- 5.12 Given the inherent uncertainties with very long term projections (between 2028 and 2033) it would not be necessary to allocate further opportunities to address this potential shortfall at this stage.

Marlow

- 5.13 The vacancy rate was relatively low in Marlow and limited potential to accommodate growth within vacant units was identified in the WTCRS 2014. The 2033 comparison goods retail

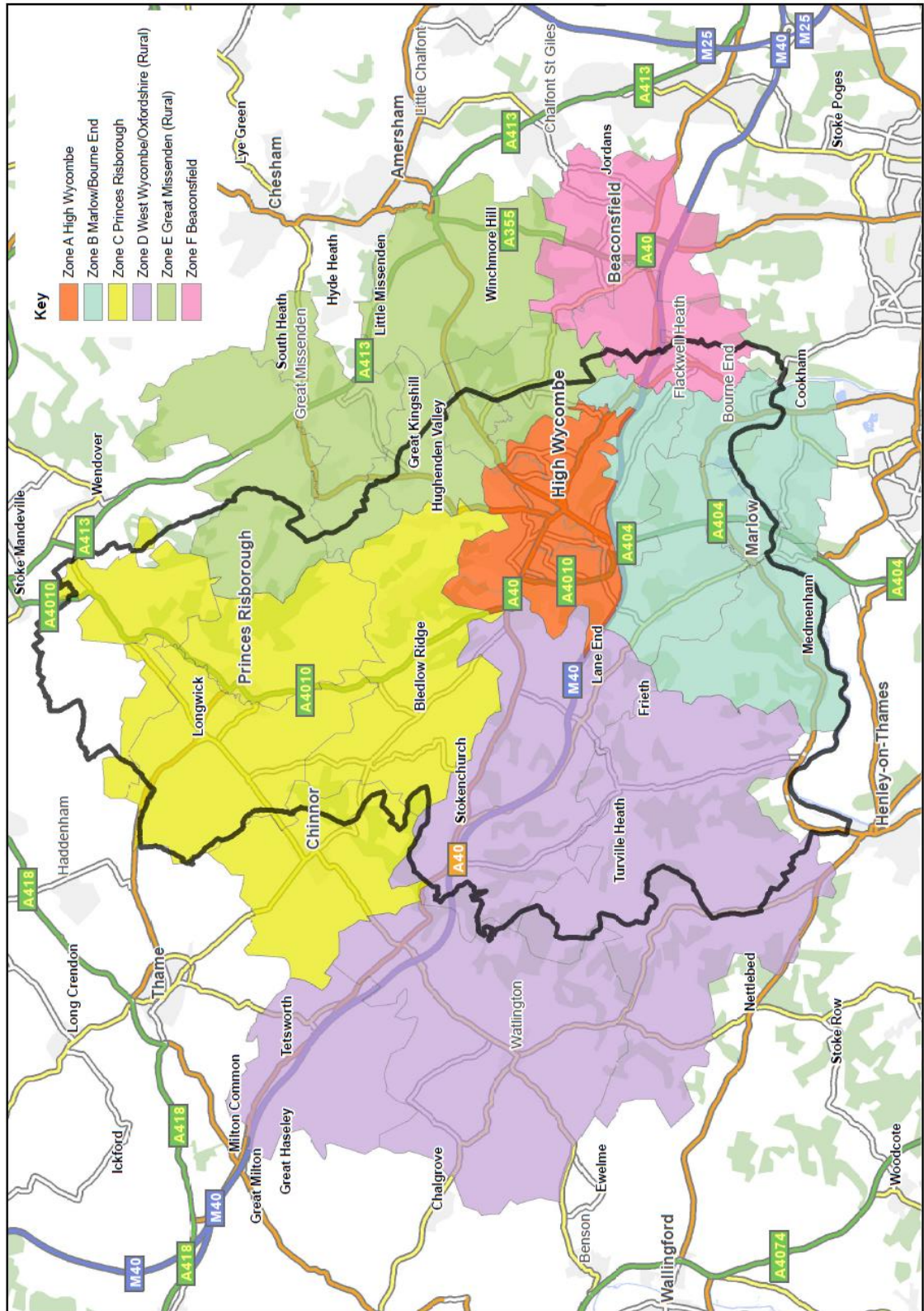
floorspace projection for Marlow is 1,600 sq.m gross. Taking into account the reoccupation of some vacant units would only leave potential for small scale extensions and infill development within the town centre.

Princes Risborough

5.14

The vacancy rate was also relatively low in Princes Risborough. The combined convenience and comparison floorspace projection is about 2,000 sq.m up to 2033. Land fronting New Road and land south of Horns Lane in Princes Risborough could accommodate this projection.

Appendix 1: Study Area



Appendix 2: Convenience Assessment

Table 1: Study Area Population Projections

Total Population	2011	2014	2016	2018	2023	2028	2033
Zone A - High Wycombe	79,188	80,537	81,446	82,355	84,628	86,900	89,172
Zone B - Marlow/Bourne End	41,559	42,277	42,764	43,250	44,473	45,667	46,853
Zone C - Princes Risborough	28,601	29,076	29,393	29,715	30,533	31,329	32,122
Zone D - West Wycombe/Oxfordshire	17,968	18,254	18,444	18,640	19,151	19,628	20,099
Zone E - East Wycombe/Great Missenden	39,310	39,977	40,352	40,728	41,666	42,605	43,544
Zone F - Beaconsfield	22,655	23,038	23,229	23,419	23,894	24,369	24,845
Total	229,281	233,159	235,628	238,107	244,345	250,499	256,634

Sources:

Experian - 2011 Census of Population and ONS mid-year estimates 2014.

Population growth based on 11,200 new dwgs in Wycombe District and 7,600 new dwgs in Chiltern and South Bucks (combined) 2013 to 2033

SNPP 2014 Projections for South Oxfordshire and Windsor and Maidenhead

Table 2: Convenience Goods Expenditure (£ per person per annum) 2014 Prices

	2014	2016	2018	2023	2028	2033
Zone A - High Wycombe	1,954	1,921	1,892	1,876	1,874	1,877
Zone B - Marlow/Bourne End	2,426	2,385	2,349	2,330	2,327	2,331
Zone C - Princes Risborough	2,411	2,370	2,334	2,315	2,312	2,316
Zone D - West Wycombe/Oxfordshire	2,392	2,351	2,316	2,297	2,294	2,298
Zone E - East Wycombe/Great Missenden	2,453	2,411	2,374	2,355	2,352	2,356
Zone F - Beaconsfield	2,482	2,440	2,403	2,383	2,380	2,384

Sources:

Experian local estimates for 2014 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies Briefing Note 14 November 2016- recommended forecast growth rates

(-1.1% in 2015, 0% in 2016, -0.2 in 2017, -0.9% in 2018, no growth 2019 to 2023 and 0.1% per annum after 2023)

Table 3: Total Convenience Goods Expenditure (£m)

	2014	2016	2018	2023	2028	2033
Zone A - High Wycombe	157.37	156.42	155.79	158.76	162.81	167.38
Zone B - Marlow/Boume End	102.58	101.99	101.59	103.60	106.25	109.21
Zone C - Princes Risborough	70.09	69.65	69.35	70.67	72.42	74.39
Zone D - West Wycombe/Oxfordshire	43.67	43.37	43.17	43.98	45.02	46.19
Zone E - East Wycombe/Great Missenden	98.05	97.28	96.71	98.12	100.20	102.59
Zone F - Beaconsfield	57.18	56.67	56.27	56.94	58.00	59.24
Total	528.94	525.38	522.88	532.07	544.70	558.99

Source: Tables 1 and 2

Table 4: Convenience Goods Market Shares 2016 (%)

Centre/Facility	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Missenden	Zone F Beaconsfield	% Inflow
High Wycombe town centre (incl. Morrison's)	45.4%	6.9%	17.4%	23.7%	18.3%	3.5%	5.0%
Other large food store in High Wycombe	45.3%	33.1%	8.1%	30.0%	29.5%	32.4%	5.0%
Local shops in High Wycombe	3.5%	1.2%	0.9%	1.7%	1.4%	1.1%	2.0%
High Wycombe Sub-Total	94.2%	41.2%	26.4%	55.4%	49.2%	37.0%	
Marlow	0.0%	26.0%	0.5%	7.9%	0.0%	0.0%	5.0%
Princes Risborough	0.2%	0.0%	40.1%	1.7%	1.0%	0.9%	5.0%
Bourne End/Flackwell Heath/Wooburn Green	1.0%	12.0%	0.0%	0.0%	0.6%	10.0%	5.0%
Other Wycombe District	0.3%	0.0%	6.6%	13.0%	0.0%	0.0%	5.0%
Other Wycombe Sub-Total	1.5%	38.0%	47.2%	22.6%	1.6%	10.9%	
Wycombe District Total	95.7%	79.2%	73.6%	78.0%	50.8%	47.9%	
Amersham/Chesham	1.0%	0.3%	0.8%	0.8%	24.9%	2.1%	n/a
Aylesbury	0.0%	0.0%	6.3%	0.0%	2.3%	0.0%	n/a
Beaconsfield	2.2%	6.0%	0.8%	0.4%	13.7%	47.6%	n/a
Gerrards Cross/the Chalfontons	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	n/a
Maidenhead/Slough	0.6%	10.0%	0.0%	1.0%	0.3%	2.0%	n/a
Thame	0.2%	0.0%	16.7%	4.3%	0.0%	0.0%	n/a
Other outside Wycombe	0.3%	4.5%	1.8%	14.9%	8.0%	0.4%	n/a
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, October 2013 adjusted to reflect food store development/commitments

Table 5: Convenience Goods Expenditure Patterns 2016 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Missenden	Zone F Beaconsfield	% Inflow	Total
Expenditure 2016	156.42	101.99	69.65	43.37	97.28	56.67		525.38
High Wycombe town centre (incl. Morrison's)	71.02	7.04	12.12	10.28	17.80	1.98	6.33	126.56
Other large food store in High Wycombe	70.86	33.76	5.64	13.01	28.70	18.36	8.96	179.29
Local shops in High Wycombe	5.47	1.22	0.63	0.74	1.36	0.62	0.21	10.25
High Wycombe Sub-Total	147.35	42.02	18.39	24.03	47.86	20.97	15.50	316.11
Marlow	0.00	26.52	0.35	3.43	0.00	0.00	1.59	31.89
Princes Risborough	0.31	0.00	27.93	0.74	0.97	0.51	1.60	32.07
Bourne End/Flackwell Heath/Wooburn Green	1.56	12.24	0.00	0.00	0.58	5.67	1.06	21.11
Other Wycombe District	0.47	0.00	4.60	5.64	0.00	0.00	0.56	11.27
Other Wycombe Sub-Total	2.35	38.75	32.87	9.80	1.56	6.18	4.82	96.33
Wycombe District Total	149.70	80.77	51.26	33.83	49.42	27.14	20.31	412.44
Amersham/Chesham	1.56	0.31	0.56	0.35	24.22	1.19	n/a	28.19
Aylesbury	0.00	0.00	4.39	0.00	2.24	0.00	n/a	6.63
Beaconsfield	3.44	6.12	0.56	0.17	13.33	26.97	n/a	50.59
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.26	0.00	0.00	n/a	0.26
Maidenhead/Slough	0.94	10.20	0.00	0.43	0.29	1.13	n/a	13.00
Thame	0.31	0.00	11.63	1.86	0.00	0.00	n/a	13.81
Other outside Wycombe	0.47	4.59	1.25	6.46	7.78	0.23	n/a	20.78
Grand Total	156.42	101.99	69.65	43.37	97.28	56.67	20.31	545.69

Source: Tables 3 and 4

Table 6: Convenience Goods Expenditure Patterns 2018 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Misseton	Zone F Beaconsfield	% Inflow	Total
Expenditure 2018	155.79	101.59	69.35	43.17	96.71	56.27		522.88
High Wycombe town centre (incl. Morrison's)	70.73	7.01	12.07	10.23	17.70	1.97	6.30	126.00
Other large food store in High Wycombe	70.57	33.63	5.62	12.95	28.53	18.23	8.92	178.45
Local shops in High Wycombe	5.45	1.22	0.62	0.73	1.35	0.62	0.20	10.21
High Wycombe Sub-Total	146.75	41.86	18.31	23.92	47.58	20.82	15.43	314.66
Marlow	0.00	26.41	0.35	3.41	0.00	0.00	1.59	31.76
Princes Risborough	0.31	0.00	27.81	0.73	0.97	0.51	1.60	31.93
Bourne End/Flackwell Heath/Wooburn Green	1.56	12.19	0.00	0.00	0.58	5.63	1.05	21.01
Other Wycombe District	0.47	0.00	4.58	5.61	0.00	0.00	0.56	11.22
Other Wycombe Sub-Total	2.34	38.61	32.73	9.76	1.55	6.13	4.80	95.91
Wycombe District Total	149.09	80.46	51.04	33.67	49.13	26.95	20.22	410.57
Amersham/Chesham	1.56	0.30	0.55	0.35	24.08	1.18	n/a	28.02
Aylesbury	0.00	0.00	4.37	0.00	2.22	0.00	n/a	6.59
Beaconsfield	3.43	6.10	0.55	0.17	13.25	26.79	n/a	50.28
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.26	0.00	0.00	n/a	0.26
Maidenhead/Slough	0.93	10.16	0.00	0.43	0.29	1.13	n/a	12.94
Thame	0.31	0.00	11.58	1.86	0.00	0.00	n/a	13.75
Other outside Wycombe	0.47	4.57	1.25	6.43	7.74	0.23	n/a	20.68
Grand Total	155.79	101.59	69.35	43.17	96.71	56.27	20.22	543.10

Source: Tables 3 and 4

Table 7: Convenience Goods Expenditure Patterns 2023 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Misseten	Zone F Beaconsfield	% Inflow	Total
Expenditure 2023	158.76	103.60	70.67	43.98	98.12	56.94		532.07
High Wycombe town centre (incl. Morrison's)	72.08	7.15	12.30	10.42	17.96	1.99	6.42	128.31
Other large food store in High Wycombe	71.92	34.29	5.72	13.20	28.94	18.45	9.08	181.60
Local shops in High Wycombe	5.56	1.24	0.64	0.75	1.37	0.63	0.21	10.39
High Wycombe Sub-Total	149.55	42.68	18.66	24.37	48.27	21.07	15.70	320.30
Marlow	0.00	26.94	0.35	3.47	0.00	0.00	1.62	32.38
Princes Risborough	0.32	0.00	28.34	0.75	0.98	0.51	1.63	32.52
Bourne End/Flackwell Heath/Wooburn Green	1.59	12.43	0.00	0.00	0.59	5.69	1.07	21.37
Other Wycombe District	0.48	0.00	4.66	5.72	0.00	0.00	0.57	11.43
Other Wycombe Sub-Total	2.38	39.37	33.36	9.94	1.57	6.21	4.89	97.71
Wycombe District Total	151.93	82.05	52.01	34.31	49.84	27.27	20.59	418.01
Amersham/Chesham	1.59	0.31	0.57	0.35	24.43	1.20	n/a	28.44
Aylesbury	0.00	0.00	4.45	0.00	2.26	0.00	n/a	6.71
Beaconsfield	3.49	6.22	0.57	0.18	13.44	27.10	n/a	50.99
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.26	0.00	0.00	n/a	0.26
Maidenhead/Slough	0.95	10.36	0.00	0.44	0.29	1.14	n/a	13.19
Thame	0.32	0.00	11.80	1.89	0.00	0.00	n/a	14.01
Other outside Wycombe	0.48	4.66	1.27	6.55	7.85	0.23	n/a	21.04
Grand Total	158.76	103.60	70.67	43.98	98.12	56.94	20.59	552.66

Source: Tables 3 and 4

Table 8: Convenience Goods Expenditure Patterns 2028 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Misseton	Zone F Beaconsfield	% Inflow	Total
Expenditure 2028	162.81	106.25	72.42	45.02	100.20	58.00		544.70
High Wycombe town centre (incl. Morrison's)	73.92	7.33	12.60	10.67	18.34	2.03	6.57	131.46
Other large food store in High Wycombe	73.75	35.17	5.87	13.51	29.56	18.79	9.30	185.94
Local shops in High Wycombe	5.70	1.27	0.65	0.77	1.40	0.64	0.21	10.64
High Wycombe Sub-Total	153.37	43.77	19.12	24.94	49.30	21.46	16.08	328.04
Marlow	0.00	27.62	0.36	3.56	0.00	0.00	1.66	33.20
Princes Risborough	0.33	0.00	29.04	0.77	1.00	0.52	1.67	33.32
Bourne End/Flackwell Heath/Wooburn Green	1.63	12.75	0.00	0.00	0.60	5.80	1.09	21.87
Other Wycombe District	0.49	0.00	4.78	5.85	0.00	0.00	0.59	11.71
Other Wycombe Sub-Total	2.44	40.37	34.18	10.18	1.60	6.32	5.01	100.10
Wycombe District Total	155.81	84.15	53.30	35.12	50.90	27.78	21.09	428.15
Amersham/Chesham	1.63	0.32	0.58	0.36	24.95	1.22	n/a	29.05
Aylesbury	0.00	0.00	4.56	0.00	2.30	0.00	n/a	6.87
Beaconsfield	3.58	6.37	0.58	0.18	13.73	27.61	n/a	52.05
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.27	0.00	0.00	n/a	0.27
Maidenhead/Slough	0.98	10.62	0.00	0.45	0.30	1.16	n/a	13.51
Thame	0.33	0.00	12.09	1.94	0.00	0.00	n/a	14.36
Other outside Wycombe	0.49	4.78	1.30	6.71	8.02	0.23	n/a	21.53
Grand Total	162.81	106.25	72.42	45.02	100.20	58.00	21.09	565.79

Source: Tables 3 and 4

Table 9: Convenience Goods Expenditure Patterns 2033 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Misseten	Zone F Beaconsfield	% inflow	Total
Expenditure 2033	167.38	109.21	74.39	46.19	102.59	59.24		558.99
High Wycombe town centre (incl. Morrison's)	75.99	7.54	12.94	10.95	18.77	2.07	6.75	135.01
Other large food store in High Wycombe	75.82	36.15	6.03	13.86	30.27	19.19	9.54	190.85
Local shops in High Wycombe	5.86	1.31	0.67	0.79	1.44	0.65	0.22	10.93
High Wycombe Sub-Total	157.67	44.99	19.64	25.59	50.48	21.92	16.51	336.80
Marlow	0.00	28.39	0.37	3.65	0.00	0.00	1.71	34.12
Princes Risborough	0.33	0.00	29.83	0.79	1.03	0.53	1.71	34.22
Bourne End/Flackwell Heath/Wooburn Green	1.67	13.10	0.00	0.00	0.62	5.92	1.12	22.44
Other Wycombe District	0.50	0.00	4.91	6.00	0.00	0.00	0.60	12.02
Other Wycombe Sub-Total	2.51	41.50	35.11	10.44	1.64	6.46	5.14	102.80
Wycombe District Total	160.18	86.49	54.75	36.03	52.12	28.37	21.65	439.59
Amersham/Chesham	1.67	0.33	0.60	0.37	25.55	1.24	n/a	29.76
Aylesbury	0.00	0.00	4.69	0.00	2.36	0.00	n/a	7.05
Beaconsfield	3.68	6.55	0.60	0.18	14.06	28.20	n/a	53.27
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.28	0.00	0.00	n/a	0.28
Maidenhead/Slough	1.00	10.92	0.00	0.46	0.31	1.18	n/a	13.88
Thame	0.33	0.00	12.42	1.99	0.00	0.00	n/a	14.74
Other outside Wycombe	0.50	4.91	1.34	6.88	8.21	0.24	n/a	22.08
Grand Total	167.38	109.21	74.39	46.19	102.59	59.24	21.65	580.64

Source: Tables 3 and 4

Table 10: Convenience Goods Floorspace and Benchmark Turnover in High Wycombe (2014 prices)

Location	Store	Gross Floorspace (Sq.M)	Sales Floorspace (sq.m net)	Convenience Goods (%)	Convenience Goods Sales (sq.m net)	Turnover (£ per sq.m)	Turnover (£m)
High Wycombe Central Area	Morrison's, Temple End	6,167	2,615	85%	2,223	£10,849	£24.11
	Sainsbury's, Oxford Rd	9,259	5,707	55%	3,139	£11,690	£36.69
	Tesco, town centre	9,296	5,688	55%	3,128	£11,058	£34.59
	Marks & Spencer Food Hall Eden Centre	2,255	1,209	95%	1,149	£10,329	£11.86
	Iceland	723	361	95%	343	£7,933	£2.72
	Other town centre (incl. Desborough Rd)	n/a	1,700	100%	1,700	£5,500	£9.35
Completed Commitments	Morrison's, Temple End Extension*	n/a	998	85%	848	£10,849	£9.20
	Sub-Total		18,278		12,530		£128.54
Other High Wycombe Urban Area	Asda, Holmers farm	9,547	5,817	75%	4,363	£15,213	£66.37
	Tesco Loudwater	6,126	3,174	85%	2,698	£11,058	£29.83
	Marks & Spencer Simply Food	1,222	664	90%	598	£10,329	£6.17
	Lidl, Richardson Street	1,326	944	85%	802	£7,723	£6.20
	Budgens, West Wycombe Rd	709	452	90%	407	£7,000	£2.85
	Co-op, New Road	193	113	95%	107	£8,903	£0.96
	Co-op, Rose Avenue, Hazelmere	77	45	95%	43	£8,903	£0.38
	Co-op, Park Parade, Hazelmere	1,284	751	90%	676	£8,903	£6.02
	Costcutter, London Road	n/a	110	95%	105	£6,000	£0.63
	Costcutter, Arnison Avenue	n/a	137	95%	130	£6,000	£0.78
	Tesco Express, North Esso, Amersham Rd	n/a	183	95%	174	£11,058	£1.92
	Tesco Express, London Road	347	209	95%	199	£11,058	£2.20
	Tesco Express, Hatters Lane	457	278	95%	264	£11,058	£2.92
	Tesco Express, New Road	193	232	95%	220	£11,058	£2.44
	Tesco Express, Polmer Green Lane	343	218	95%	207	£11,058	£2.29
Tesco Express, South Esso, Marlow Rd	n/a	173	95%	164	£11,058	£1.82	
Completed Commitments	Waitrose, Sports Centre Handy Cross*	n/a	1,873	90%	1,686	£11,665	£19.66
	Co-op, Plomer Green Lane*	n/a	322	95%	306	£8,903	£2.72
	Tesco Express, Chapel Road, Sands*	316	198	95%	188	£11,058	£2.08
	Sub-Total		15,893		13,336		£158.23
			34,171		25,866		£286.77

Source: StorePoint 2017, Goad Plans 2016, Mintel and VOA

Table 11: Convenience Goods Floorspace and Benchmark Turnover in Rest of Wycombe District (2014 Prices)

Location	Store	Gross Floorspace (Sq.M)	Sales Floorspace (sq.m net)	Convenience Goods (%)	Convenience Goods Sales (sq.m net)	Turnover (£ per sq.m)	Turnover (£m)
Marlow	Sainsbury's, West Street	2,791	1,720	85%	1,462	£11,690	£17.09
	Sainsbury's Local High Street	440	245	95%	233	£11,690	£2.72
	Waitrose	1,889	1,081	90%	973	£11,665	£11.35
	Marks & Spencer Simply Food	166	104	90%	94	£10,329	£0.97
	Other Marlow	n/a	300	100%	300	£5,500	£1.65
	Sub-Total			3,450		3,061	
Princes Risborough	Tesco	2,057	1,259	90%	1,133	£11,058	£12.53
	Marks & Spencer Simply Food	1,222	743	95%	706	£10,329	£7.29
	Other Princes Risborough	n/a	300	100%	300	£5,500	£1.65
Completed Commitments							
	Co-op, Bell Street (1)		322	95%	306	£8,903	£2.72
	Sub-Total		2,624		2,445		£24.19
Bourne End/ Flackwell Heath/ Wooburn Green	Co-op, The Parade, Bourne End	183	132	95%	125	£8,903	£1.12
	Co-op, Wakeman Road, Bourne End	310	178	95%	169	£8,903	£1.51
	Other Bourne End	n/a	200	100%	200	£5,500	£1.10
	Sainsbury's Local, Flackwell Heath	365	197	95%	187	£11,690	£2.19
	Other Flackwell Heath	n/a	150	100%	150	£5,500	£0.83
	Tesco Express, Wooburn Green	245	171	95%	162	£11,058	£1.80
Completed Commitments							
	Tesco Express, Bourne End (2)	341	224	95%	213	£11,068	£2.36
	M&S Simply Food, Bourne End (2)	n/a	209	95%	199	£10,329	£2.05
	Tesco Express, Stokenchurch (2)	366	254	95%	241	£11,068	£2.67
	Sub-Total		1,715		1,647		£15.61
Total			7,789		7,153		£73.58

Source: StorePoint 2017, Mintel and VOA

(1) Princes Risborough completed commitments since 2013 = 322 sq.m net or approximately 400 sq.m gross

(2) Other Wycombe completed commitments since 2013 = 687 sq.m net or approximately 900 sq.m gross

Table 12: Convenience Goods Benchmark Turnover of Commitments

Town/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
High Wycombe					
High Wycombe Railway Station	500	95%	475	£12,000	£5.70
Convenience store, Mill End Road, Sands	270	95%	257	£12,000	£3.08
Daws Hill convenience store	300	95%	285	£12,000	£3.42
Sub-Total	1,070		1,017		£12.20
Other Wycombe District					
Sainsbury's, Parade Court, Bourne End	450	95%	428	£11,690	£5.00
Sub-Total	450		428		£5.00
Total	1,520		1,444		£17.20

Source: Wycombe DC and Mintel

* Uncompleted commitments = 1,520 sq.m net or approximately 2,100 sq.m gross

Table 13: Summary of Convenience Goods Expenditure 2016 to 2033

Centre	2016	2018	2023	2028	2033
Available Expenditure in District (£m)					
High Wycombe	316.11	314.66	320.30	328.04	336.80
Marlow	31.89	31.76	32.38	33.20	34.12
Princes Risborough	32.07	31.93	32.52	33.32	34.22
Bourne End/Flackwell Heath/Wooburn Green	21.11	21.01	21.37	21.87	22.44
Other Wycombe District	11.27	11.22	11.43	11.71	12.02
Wycombe District Total	412.44	410.57	418.01	428.15	439.59
Benchmark Turnover Existing Floorspace (£m)					
High Wycombe	286.77	286.77	286.77	286.77	286.77
Marlow	33.78	33.78	33.78	33.78	33.78
Princes Risborough	24.19	24.19	24.19	24.19	24.19
Bourne End/Flackwell Heath/Wooburn Green	15.61	15.61	15.61	15.61	15.61
Other Wycombe District	11.27	11.27	11.27	11.27	11.27
Wycombe District Total	371.62	371.62	371.62	371.62	371.62
Benchmark Turnover Commitments (£m)					
High Wycombe	0.00	12.20	12.20	12.20	12.20
Marlow	0.00	0.00	0.00	0.00	0.00
Princes Risborough	0.00	0.00	0.00	0.00	0.00
Bourne End/Flackwell Heath/Wooburn Green	0.00	5.00	5.00	5.00	5.00
Other Wycombe District	0.00	0.00	0.00	0.00	0.00
Wycombe District Total	0.00	17.20	17.20	17.20	17.20

Source: Tables 5 to 12

Table 14: Convenience Goods Floorspace Projections 2016 to 2033

Centre	2016	2018	2023	2028	2033
Surplus/Deficit Expenditure (£m)					
High Wycombe	29.34	15.69	21.33	29.07	37.83
Marlow	-1.89	-2.02	-1.39	-0.57	0.34
Princes Risborough	7.87	7.73	8.33	9.13	10.03
Bourne End/Flackwell Heath/Wooburn Green	5.50	0.40	0.77	1.27	1.83
Other Wycombe District	0.00	-0.05	0.16	0.44	0.75
Wycombe District Total	40.82	21.76	29.20	39.33	50.78
Turnover New Floorspace (£ per sq m net)	12,000	12,000	12,000	12,000	12,000
Sales Floorspace Capacity (Sq.M Net)					
High Wycombe	2,445	1,308	1,778	2,423	3,152
Marlow	-158	-168	-116	-48	29
Princes Risborough	656	644	694	761	835
Bourne End/Flackwell Heath/Wooburn Green	458	33	64	106	153
Other Wycombe District	0	-4	14	37	62
Wycombe District Total	3,401	1,813	2,433	3,278	4,232
Gross Floorspace Capacity (Sq.M)					
High Wycombe	3,493	1,868	2,540	3,461	4,503
Marlow	-225	-240	-166	-68	41
Princes Risborough	937	920	992	1,087	1,194
Bourne End/Flackwell Heath/Wooburn Green	655	48	91	151	218
Other Wycombe District	0	-6	19	52	89
Wycombe District Total	4,859	2,590	3,476	4,683	6,045

Source: Tables 5 and 13

Appendix 3: Comparison Assessment

Table 1: Study Area Population Projections

Total Population	2011	2014	2016	2018	2023	2028	2033
Zone A - High Wycombe	79,188	80,537	81,446	82,355	84,628	86,900	89,172
Zone B - Marlow/Bourne End	41,559	42,277	42,764	43,250	44,473	45,667	46,853
Zone C - Princes Risborough	28,601	29,076	29,393	29,715	30,533	31,329	32,122
Zone D - West Wycombe/Oxfordshire	17,968	18,254	18,444	18,640	19,151	19,628	20,099
Zone E - East Wycombe/Great Missenden	39,310	39,977	40,352	40,728	41,666	42,605	43,544
Zone F - Beaconsfield	22,655	23,038	23,229	23,419	23,894	24,369	24,845
Total	229,281	233,159	235,628	238,107	244,345	250,499	256,634

Sources:

Experian - 2011 Census of Population and ONS mid-year estimates 2014.

Population growth based on 1,200 new dwgs in Wycombe District and 7,600 new dwgs in Chiltern and South Bucks (combined) 2013 to 2033

SNPP 2014 Projections for South Oxfordshire and Windsor and Maidenhead

Table 2: Comparison Goods Expenditure (£ per person per annum) 2014 Prices

	2014	2016	2018	2023	2028	2033
Zone A - High Wycombe	2,661	2,847	2,927	3,352	3,914	4,565
Zone B - Marlow/Bourne End	3,918	4,191	4,309	4,934	5,762	6,721
Zone C - Princes Risborough	3,902	4,174	4,291	4,914	5,739	6,694
Zone D - West Wycombe/Oxfordshire	3,725	3,985	4,097	4,692	5,479	6,391
Zone E - East Wycombe/Great Missenden	4,058	4,341	4,463	5,111	5,969	6,962
Zone F - Beaconsfield	4,033	4,313	4,435	5,079	5,931	6,918

Sources:

Experian local estimates for 2014 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies Briefing Note 14 November 2016 - recommended forecast growth rates (4.6% in 2015, 3.3% in 2016, 1.4% in 2017, 1% in 2018, 2.9% per annum between 2019-23 and 3.0% beyond 2023)

Table 3: Total Comparison Goods Expenditure (£m)

	2014	2016	2018	2023	2028	2033
Zone A - High Wycombe	214.34	231.84	241.05	283.66	340.14	407.11
Zone B - Marlow/Bourne End	165.63	179.20	186.36	219.44	263.14	314.89
Zone C - Princes Risborough	113.45	122.67	127.52	150.05	179.79	215.01
Zone D - West Wycombe/Oxfordshire	68.00	73.49	76.37	89.85	107.54	128.45
Zone E - East Wycombe/Great Missenden	162.24	175.16	181.78	212.96	254.30	303.14
Zone F - Beaconsfield	92.91	100.19	103.86	121.36	144.54	171.87
Total	816.57	882.56	916.93	1077.32	1289.46	1540.48

Source: Tables 1 and 2

Table 4: Comparison Goods Market Shares 2016 (%)

Centre/Facility	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Missenden	Zone F Beaconsfield	% Inflow
High Wycombe town centre	52.6%	33.7%	30.3%	42.4%	38.3%	33.7%	10.0%
High Wycombe retail warehouses	20.3%	11.7%	8.7%	11.0%	14.8%	7.8%	10.0%
John Lewis High Wycombe	13.7%	16.5%	14.3%	13.0%	15.6%	19.1%	20.0%
Hazelmere district centre	0.1%	0.0%	0.1%	0.0%	0.6%	0.0%	5.0%
Marlow	0.9%	9.8%	1.0%	4.4%	0.7%	0.8%	10.0%
Princes Risborough	0.3%	0.1%	9.6%	0.1%	0.3%	0.0%	5.0%
Bourne End/Flackwell Heath district centres	0.2%	1.5%	0.0%	0.2%	0.0%	0.7%	5.0%
Other shops in Wycombe District	0.5%	1.7%	0.1%	1.5%	1.3%	4.1%	2.0%
Wycombe Sub-Total	88.6%	75.0%	64.1%	72.6%	71.6%	66.2%	
Amersham/Chesham	0.4%	0.4%	0.1%	1.3%	6.6%	0.8%	n/a
Aylesbury	0.9%	0.1%	19.5%	2.5%	3.9%	0.2%	n/a
Beaconsfield	0.5%	2.4%	0.2%	0.0%	3.2%	18.1%	n/a
Gerrards Cross/the Chalfonts	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Maidenhead/Slough	1.4%	9.6%	0.0%	0.6%	0.1%	3.2%	n/a
Thame	0.0%	0.0%	4.6%	2.1%	0.1%	0.0%	n/a
Other outside Wycombe	8.2%	12.5%	11.5%	20.9%	14.5%	11.5%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, October 2013 and NLP adjustments

Table 5: Comparison Goods Expenditure Patterns 2016 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Misseton	Zone F Beaconsfield	% Inflow	Total
Expenditure 2016	231.84	179.20	122.67	73.49	175.16	100.19		882.56
High Wycombe town centre	121.95	60.39	37.17	31.16	67.08	33.76	39.06	390.58
High Wycombe retail warehouses	47.06	20.97	10.67	8.08	25.92	7.81	13.39	133.92
John Lewis High Wycombe	31.76	29.57	17.54	9.55	27.32	19.14	33.72	168.61
Hazlemere district centre	0.23	0.00	0.12	0.00	1.05	0.00	0.07	1.48
Marlow	2.09	17.56	1.23	3.23	1.23	0.80	2.90	29.04
Princes Risborough	0.70	0.18	11.78	0.07	0.53	0.00	0.70	13.95
Bourne End/Flackwell Heath district centres	0.46	2.69	0.00	0.15	0.00	0.70	0.21	4.21
Other shops in Wycombe District	1.16	3.05	0.12	1.10	2.28	4.11	0.24	12.06
Wycombe District Sub-Total	205.41	134.40	78.63	53.35	125.41	66.33	90.30	753.84
Amersham/Chesham	0.93	0.72	0.12	0.96	11.56	0.80	n/a	15.08
Aylesbury	2.09	0.18	23.92	1.84	6.83	0.20	n/a	35.06
Beaconsfield	1.16	4.30	0.25	0.00	5.61	18.13	n/a	29.45
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.00	0.00	0.00	n/a	0.00
Maidenhead/Slough	3.25	17.20	0.00	0.44	0.18	3.21	n/a	24.27
Thame	0.00	0.00	5.64	1.54	0.18	0.00	n/a	7.36
Other outside Wycombe	19.01	22.40	14.11	15.36	25.40	11.52	n/a	107.80
Total	231.84	179.20	122.67	73.49	175.16	100.19		972.85

Source: Tables 3 and 4

Table 6: Comparison Goods Expenditure Patterns 2018 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Misseton	Zone F Beaconsfield	% Inflow	Total
Expenditure 2018	241.05	186.36	127.52	76.37	181.78	103.86		916.93
High Wycombe town centre	126.79	62.80	38.64	32.38	69.62	35.00	40.58	405.82
High Wycombe retail warehouses	48.93	21.80	11.09	8.40	26.90	8.10	13.92	139.15
John Lewis High Wycombe	33.02	30.75	18.24	9.93	28.36	19.84	35.03	175.16
Hazelmere district centre	0.24	0.00	0.13	0.00	1.09	0.00	0.08	1.54
Marlow	2.17	18.26	1.28	3.36	1.27	0.83	3.02	30.19
Princes Risborough	0.72	0.19	12.24	0.08	0.55	0.00	0.72	14.50
Bourne End/Flackwell Heath district centres	0.48	2.80	0.00	0.15	0.00	0.73	0.22	4.38
Other shops in Wycombe District	1.21	3.17	0.13	1.15	2.36	4.26	0.25	12.52
Wycombe District Sub-Total	213.57	139.77	81.74	55.45	130.15	68.76	93.82	783.25
Amersham/Chesham	0.96	0.75	0.13	0.99	12.00	0.83	n/a	15.66
Aylesbury	2.17	0.19	24.87	1.91	7.09	0.21	n/a	36.43
Beaconsfield	1.21	4.47	0.26	0.00	5.82	18.80	n/a	30.55
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.00	0.00	0.00	n/a	0.00
Maidenhead/Slough	3.37	17.89	0.00	0.46	0.18	3.32	n/a	25.23
Thame	0.00	0.00	5.87	1.60	0.18	0.00	n/a	7.65
Other outside Wycombe	19.77	23.29	14.66	15.96	26.36	11.94	n/a	111.99
Total	241.05	186.36	127.52	76.37	181.78	103.86		1,010.75

Table 7: Comparison Goods Expenditure Patterns 2023 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Missenden	Zone F Beaconsfield	% Inflow	Total
Expenditure 2023	283.66	219.44	150.05	89.85	212.96	121.36		1,077.32
High Wycombe town centre	149.20	73.95	45.46	38.10	81.56	40.90	47.69	476.87
High Wycombe retail warehouses	57.58	25.67	13.05	9.88	31.52	9.47	16.35	163.53
John Lewis High Wycombe	38.86	36.21	21.46	11.68	33.22	23.18	41.15	205.76
Hazlemere district centre	0.28	0.00	0.15	0.00	1.28	0.00	0.09	1.80
Marlow	2.55	21.51	1.50	3.95	1.49	0.97	3.55	35.53
Princes Risborough	0.85	0.22	14.40	0.09	0.64	0.00	0.85	17.06
Bourne End/Flackwell Heath district centres	0.57	3.29	0.00	0.18	0.00	0.85	0.26	5.15
Other shops in Wycombe District	1.42	3.73	0.15	1.35	2.77	4.98	0.29	14.68
Wycombe District Sub-Total	251.32	164.58	96.18	65.23	152.48	80.34	110.24	920.37
Amersham/Chesham	1.13	0.88	0.15	1.17	14.06	0.97	n/a	18.36
Aylesbury	2.55	0.22	29.26	2.25	8.31	0.24	n/a	42.83
Beaconsfield	1.42	5.27	0.30	0.00	6.81	21.97	n/a	35.77
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.00	0.00	0.00	n/a	0.00
Maidenhead/Slough	3.97	21.07	0.00	0.54	0.21	3.88	n/a	29.67
Thame	0.00	0.00	6.90	1.89	0.21	0.00	n/a	9.00
Other outside Wycombe	23.26	27.43	17.26	18.78	30.88	13.96	n/a	131.56
Total	283.66	219.44	150.05	89.85	212.96	121.36		1,187.56

Source: Tables 3 and 4

Table 8: Comparison Goods Expenditure Patterns 2028 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Missenden	Zone F Beaconsfield	% Inflow	Total
Expenditure 2028	340.14	263.14	179.79	107.54	254.30	144.54		1,289.46
High Wycombe town centre	178.92	88.68	54.48	45.60	97.40	48.71	57.09	570.86
High Wycombe retail warehouses	69.05	30.79	15.64	11.83	37.64	11.27	19.58	195.80
John Lewis High Wycombe	46.60	43.42	25.71	13.98	39.67	27.61	49.25	246.23
Hazelmere district centre	0.34	0.00	0.18	0.00	1.53	0.00	0.11	2.15
Marlow	3.06	25.79	1.80	4.73	1.78	1.16	4.26	42.57
Princes Risborough	1.02	0.26	17.26	0.11	0.76	0.00	1.02	20.44
Bourne End/Flackwell Heath district centres	0.68	3.95	0.00	0.22	0.00	1.01	0.31	6.16
Other shops in Wycombe District	1.70	4.47	0.18	1.61	3.31	5.93	0.35	17.55
Wycombe District Sub-Total	301.37	197.36	115.25	78.08	182.08	95.68	131.96	1,101.77
Amersham/Chesham	1.36	1.05	0.18	1.40	16.78	1.16	n/a	21.93
Aylesbury	3.06	0.26	35.06	2.69	9.92	0.29	n/a	51.28
Beaconsfield	1.70	6.32	0.36	0.00	8.14	26.16	n/a	42.67
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.00	0.00	0.00	n/a	0.00
Maidenhead/Slough	4.76	25.26	0.00	0.65	0.25	4.63	n/a	35.55
Thame	0.00	0.00	8.27	2.26	0.25	0.00	n/a	10.78
Other outside Wycombe	27.89	32.89	20.68	22.48	36.87	16.62	n/a	157.43
Total	340.14	263.14	179.79	107.54	254.30	144.54		1,421.42

Source: Tables 3 and 4

Table 9: Comparison Goods Expenditure Patterns 2033 (£m)

	Zone A High Wycombe	Zone B Marlow/Bourne End	Zone C Princes Risborough	Zone D W. Wycombe/ Oxfordshire	Zone E E. Wycombe/ Missenden	Zone F Beaconsfield	% Inflow	Total
Expenditure 2033	407.11	314.89	215.01	128.45	303.14	171.87		1,540.48
High Wycombe town centre	214.14	106.12	65.15	54.46	116.10	57.92	68.21	682.11
High Wycombe retail warehouses	82.64	36.84	18.71	14.13	44.86	13.41	23.40	233.99
John Lewis High Wycombe	55.77	51.96	30.75	16.70	47.29	32.83	58.82	294.12
Hazelmere district centre	0.41	0.00	0.22	0.00	1.82	0.00	0.13	2.57
Marlow	3.66	30.86	2.15	5.65	2.12	1.37	5.09	50.91
Princes Risborough	1.22	0.31	20.64	0.13	0.91	0.00	1.22	24.44
Bourne End/Flackwell Heath district centres	0.81	4.72	0.00	0.26	0.00	1.20	0.37	7.37
Other shops in Wycombe District	2.04	5.35	0.22	1.93	3.94	7.05	0.42	20.94
Wycombe District Sub-Total	360.70	236.17	137.82	93.25	217.05	113.78	157.66	1,316.44
Amersham/Chesham	1.63	1.26	0.22	1.67	20.01	1.37	n/a	26.16
Aylesbury	3.66	0.31	41.93	3.21	11.82	0.34	n/a	61.28
Beaconsfield	2.04	7.56	0.43	0.00	9.70	31.11	n/a	50.83
Gerrards Cross/the Chalfonts	0.00	0.00	0.00	0.00	0.00	0.00	n/a	0.00
Maidenhead/Slough	5.70	30.23	0.00	0.77	0.30	5.50	n/a	42.50
Thame	0.00	0.00	9.89	2.70	0.30	0.00	n/a	12.89
Other outside Wycombe	33.38	39.36	24.73	26.85	43.96	19.77	n/a	188.04
Total	407.11	314.89	215.01	128.45	303.14	171.87		1,698.14

Source: Tables 3 and 4

Table 10: Comparison Goods Floorspace Implemented Since 2013 and Commitments

Town/Store	Gross Floorspace (sq.m)	Net Sales Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Completed 2013 to 2016				
Next at Home, High Wycombe	7,165	4,636	£3,500	£16.23
Harveys/Benson's Beds, Unit A Wycombe Retail Park	1,466	1,246	£2,500	£3.12
Morrison's, Temple End - extension (15%)	165	150	£7,000	£1.05
Waitrose, Sports Centre Handy Cross (10%)	338	187	£7,000	£1.31
Dunelm Knaves Beech, High Wycombe	3,484	2,961	£2,500	£7.40
Co-op, Plomer Green Lane (5%)	23	16	£7,000	£0.11
Tesco Express, Chapel Road, Sands (5%)	14	10	£7,000	£0.07
High Wycombe Sub-Total	12,655	9,206		£29.29
Co-op, Bell Street, Princes Risborough (5%)	27	16	£7,000	£0.11
Tesco Express, Bourne End (5%)	17	11	£7,000	£0.08
M&S Simply Food, Bourne End (5%)	15	10	£7,000	£0.07
Tesco Express, Stokenchurch (5%)	18	13	£7,000	£0.09
Other Sub-Total	77	50		£0.35
Unimplemented Commitments				
Halfords mezzanine floor	213	181	£2,500	£0.45
Former Gas Works, Lily's Walk, High Wycombe	883	662	£6,000	£3.97
High Wycombe Railway Station (5%)	36	25	£7,000	£0.18
Convenience store, Mill End Road, Sands (5%)	19	13	£7,000	£0.09
Daws Hill convenience store (5%)	21	15	£7,000	£0.11
Sainsbury's, Parade Court, Bourne End	31	22	£7,000	£0.15
Sub-Total	1,203	918		£4.95
Total	13,935	10,175		£34.59

Source: ORC StorePoint, VOA and planning application details

Table 11: Summary of Comparison Goods Expenditure and Turnover 2016 to 2033

	2016	2018	2023	2028	2033
Available Expenditure in District (£m)					
High Wycombe town centre	390.58	405.82	476.87	570.86	682.11
High Wycombe retail warehouses	133.92	139.15	163.53	195.80	233.99
John Lewis High Wycombe	168.61	175.16	205.76	246.23	294.12
Hazlemere district centre	1.48	1.54	1.80	2.15	2.57
Marlow	29.04	30.19	35.53	42.57	50.91
Princes Risborough	13.95	14.50	17.06	20.44	24.44
Bourne End/Flackwell Heath district centres	4.21	4.38	5.15	6.16	7.37
Other shops in Wycombe District	12.06	12.52	14.68	17.55	20.94
Total	753.84	783.25	920.37	1,101.77	1,316.44
Turnover of Existing Facilities (£m)					
High Wycombe town centre	390.58	406.36	448.65	495.35	546.90
High Wycombe retail warehouses	133.92	139.33	153.83	169.84	187.52
John Lewis High Wycombe	168.61	175.42	193.68	213.84	236.09
Hazlemere district centre	1.48	1.54	1.70	1.88	2.07
Marlow	29.04	30.21	33.36	36.83	40.66
Princes Risborough	13.95	14.51	16.02	17.69	19.53
Bourne End/Flackwell Heath district centres	4.21	4.38	4.84	5.34	5.90
Other shops in Wycombe District	12.06	12.54	13.85	15.29	16.88
Total	753.84	784.29	865.92	956.05	1,055.56
Turnover of completions and commitments (£m)					
High Wycombe town centre	5.20	5.41	5.97	6.59	7.28
High Wycombe retail warehouses /out of centre	28.88	30.05	33.18	36.63	40.44
John Lewis High Wycombe	0.00	0.00	0.00	0.00	0.00
Hazlemere district centre	0.00	0.00	0.00	0.00	0.00
Marlow	0.00	0.00	0.00	0.00	0.00
Princes Risborough	0.11	0.12	0.13	0.14	0.16
Bourne End/Flackwell Heath district centres	0.39	0.41	0.45	0.50	0.55
Other shops in Wycombe District	0.00	0.00	0.00	0.00	0.00
Total	34.59	35.98	39.73	43.86	48.43

Source: Tables 5 to 10

Table 11: Comparison Goods Floorspace Capacity 2016 to 2033

	2016	2018	2023	2028	2033
Surplus/Deficit Expenditure (£m)					
High Wycombe	-34.08	-36.43	10.85	90.65	191.98
Hazlemere district centre	0.00	0.00	0.10	0.28	0.50
Marlow	0.00	-0.02	2.17	5.74	10.25
Princes Risborough	-0.11	-0.13	0.91	2.60	4.75
Bourne End/Flackwell Heath district centres	-0.39	-0.41	-0.14	0.33	0.92
Other shops in Wycombe District	0.00	-0.03	0.84	2.26	4.05
Total	-34.59	-37.03	14.72	101.86	212.45
Turnover Density New Floorspace (£ per sq.m)					
	£6,000	£6,242	£6,892	£7,609	£8,401
Floorspace Requirement (sq.m net)					
High Wycombe	-5,680	-5,836	1,574	11,912	22,851
Hazlemere district centre	0	-1	15	36	59
Marlow	0	-4	315	755	1,220
Princes Risborough	-19	-21	132	342	565
Bourne End/Flackwell Heath district centres	-65	-66	-21	43	110
Other shops in Wycombe District	0	-4	121	297	483
Total	-5,764	-5,932	2,136	13,385	25,288
Floorspace Requirement (sq.m gross)					
High Wycombe	-7,574	-7,782	2,099	15,883	30,468
Hazlemere district centre	0	-1	20	49	79
Marlow	0	-5	420	1,006	1,627
Princes Risborough	-25	-28	175	456	754
Bourne End/Flackwell Heath district centres	-87	-88	-27	57	146
Other shops in Wycombe District	0	-5	162	396	643
Total	-7,686	-7,909	2,848	17,847	33,717

Source: Tables 5 to 10

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