



# Nathaniel Lichfield and Partners

Planning Design Economics

**WYCOMBE DISTRICT COUNCIL**

**RETAIL AND TOWN CENTRES STUDY  
UPDATE 2009**

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1.0

## Introduction

1.1

Nathaniel Lichfield & Partners (NLP) were commissioned by Wycombe District Council to prepare a retail and town centres study in 2004. The key aim of the study is to provide a strategy for development up to 2016 and to inform visioning for the Community Plan to 2026. The 2004 study included an assessment of retail capacity and an analysis of the three main retail centres within the authority area, namely High Wycombe, Marlow and Princes Risborough. The study was subsequently updated in July 2006.

1.2

This report provides a further update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. This update report should be read along side the 2004 town centre and retail study.

1.3

Section 2 of this report summarises recent changes relevant to the retail capacity assessment. Section 3 sets out the updated retail capacity assessment. Section 4 provides the recommendations and conclusions.



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2.0

## Recent Changes

### **The Need for the Study Update**

2.1 The Council's previous retail and town centres studies (2004 and 2006 update) provided projections up to 2016 and 2021 respectively. These projections were based on baseline local retail expenditure data for 2002 and 2004. Data is now available for 2007. The aim of this study update is to provide updated projections for the period up to 2026.

### **The Implications of PPS6**

2.2 PPS6: Planning for Town Centres was published in March 2005, which replaced PPG6: Town Centres and Retail Developments and the various related ministerial statements. Proposed changes were published for consultation in July 2008.

2.3 A major change within PPS6 is the more proactive role councils should play in identifying town centre development sites. PPS6 clearly states that local planning authorities should plan positively for growth by making provision for a range and choice of shopping, leisure and local services. This suggests the onus is placed on the Council to identify sites to accommodate at least the 5-year demand for development. The study update must continue to include short/medium/long term projections, and identify whether recent and proposed development proposals can accommodate this need. The proposed changes to PPS6 are not expected to change these objectives or the approach to be adopted by councils.

### **Proposed Changes to PPS6 (10th July 2008)**

2.4 On 10 July 2008, the Department of Communities and Local Government published a Consultation Document on proposed changes to PPS6 Planning for Town Centres. The Consultation Paper proposes replacing the current 'need' and 'impact' tests set out in PPS6 with a new 'impact test'.

2.5 The aim of the document is to address the unintended effects of the current guidance. The key Government objective to promote the vitality and viability of town centres remains, as does much of the Government's guidance on positive planning and the plan-led approach. However, other objectives which should be taken into account, or wider Government objectives that may be relevant include:

- promotion of competition between retailers;
- raising the productivity growth rate of the UK economy;
- encouraging investment in deprived areas;
- building prosperous communities by improving economic performance;
- helping to tackle climate change; and

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- consideration of terrorism as well as crime.

2.6 The need for local authorities to consider quantitative and qualitative need when preparing development plans remains.

2.7 The importance of seeking a good mix of shops and services in a centre is also referred to, with the role of smaller shops specifically noted. Authorities are encouraged to seek to promote competitive town centre environments.

2.8 Suggested changes to Chapter 4 of PPS6 includes a list of key indicators that LPAs should collect and use to monitor the health of their town centres, including:

- the proportion of vacant street level property and the length of time properties have been vacant;
- land values and the length of time key sites have remained undeveloped; and
- perception of crime and occurrence of crime including safety and security issues relating to the threat of terrorism.

2.9 PPS6 gave greater weight to quantitative need assessments. The proposed changes now appear to give equal to both quantitative and qualitative need, which suggests the council's study should continue to include a comprehensive assessment of need.

2.10 The Proposed Changes to PPS6 were the subject of consultation until 3 October 2008 and the Summary of Public Consultation Responses was published on 5 February 2009. Adoption of the revised PPS6 is expected later this year.

## **Regional Policy**

2.11 The South East England Regional Assembly approved and submitted the South East Plan to Government in March 2006. Consultation on behalf of an independent panel of inspectors ran from March to June 2006. The examination-in-public ran from November to March 2007. The inspectors report was published by the Government Office for the South East in August 2007. In July 2008, the Government launched a public consultation on its proposed changes and consultation ran from July to October 2008. Government approval of the final Plan is expected spring 2009.

2.12 The South East Plan identifies High Wycombe as a Regional Hub and a Primary Regional Town Centre, within the network of strategic town centres. High Wycombe is one of 24 primary regional town centres across the region, along with Aylesbury, Oxford, Reading and Slough. Below the primary regional centres, a further 26 secondary regional centres are identified, including

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Maidenhead. Marlow and Princes Risborough are not identified as strategic centres. However, Policy TC2 recognises that there are many other centres in the region that meet local needs, and Local Development Documents should identify and develop policies for these centres.

- 2.13 Policy TC2 indicates that primary and secondary regional centres will be the focus for major retail development (over 10,000 sq m gross) and uses that attract large numbers of people including cultural, tourism, social and community venues.
- 2.14 High Wycombe is located within the Sub-regional Strategy Area 6: Western Corridor and Blackwater Valley. Within this area the priorities are to focus new development in the hubs of Reading, Basingstoke and Slough, whilst sustaining and enhancing other centres (i.e. including High Wycombe, Marlow and Princes Risborough).
- 2.15 High Wycombe as a regional hub, along with Aylesbury, Oxford, Reading and Slough. Policy CC8b seeks to support and develop the role of High Wycombe by: increasing levels of accessibility by public transport, walking and cycling; encouraging higher density land uses and mixed uses; and the development of high quality transport interchange facilities.

### **The Economic Downturn**

- 2.16 The economic downturn is already having a significant impact on the retail and leisure sectors. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Woolworth, MFI, Land of Leather and Zavvi). Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.
- 2.17 The most recent Government expenditure data available (2007) does not reflect this downturn. Projecting expenditure levels within this study update does not assume a continuation of recent past trends (i.e. significant expenditure growth), particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. The study update must take a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study update should take a balanced approach.

### **Recent Development**

- 2.18 There has been significant development activity in Wycombe District since the previous studies were completed, the key developments are as follows.

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- The Eden Centre in High Wycombe town centre development was completed in Spring 2008, including the refurbishment of the Octagon Centre.
  - The Wycombe Marsh retail warehouse development was completed after the 2006 study update.
  - Construction has commenced on the Sainsbury redevelopment at Dovecot, and the size of store now proposed is larger than previously envisaged.
  - Marks & Spencer has relocated to Eden and their vacated premises have been occupied by Primark.
  - Marks & Spencer has opened a Simply Food Store in Princes Risborough, replacing the Budgens store. Marks & Spencer has also opened a Simply food store at Wycombe Marsh retail park.
  - A Tesco Express store has opened on Marlow Road in High Wycombe and another is proposed in the Cressex area. A Sainsbury Local Store is proposed in Bourne End.
  - The Woolworth store is now vacant and generally vacancy levels in certain parts of the town centre, particularly in the Chilterns and White Hart Street, have increased.

2.19

A number of development commitments were expected to be completed by 2009 and were included within the previous studies. The Gas Works on Lily Walk remains un-developed but has extant planning permission for bulky goods retail units. The Waitrose store in Marlow has not been redeveloped and expanded, and we understand proposals have emerged for a Sainsbury store in this location. The Tesco store at Gerrards Cross has been delayed and remains under-construction. This store is expected to reduce High Wycombe's market share of convenience expenditure in the east of the catchment area.

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## Quantitative Scope for Retail Floorspace

### Introduction

This section assesses the quantitative scope for new retail floorspace in Wycombe District in the period from 2009 to 2026. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

All monetary values expressed in this analysis are at 2007 prices unless stated otherwise. The previous update was based on 2004 prices and therefore the figures are not directly comparable.

### Methodology and Data

The quantitative analysis is based on a study area defined for the three main town centres within the District. The study area has been divided into 8 zones or sectors (A to H) for more detailed analysis.

The study area is shown on Plan 1 in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of the major competing shopping destinations, i.e. Aylesbury, Hemel Hempstead, Maidenhead, Oxford, Reading, Slough, Watford and Uxbridge. Shopping facilities within Wycombe District are expected to attract most of their trade from residents within the study area, although there will be an element of trade drawn from beyond the study area.

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 2007 have been obtained.

Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2007 to 2011). Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

For longer term projections Experian's ultra long term growth rate has been adopted (0.7% for convenience goods and 4.6% for comparison) to project expenditure between 2011 to 2014 and beyond. We believe the Experian's lower EBS growth rates reflect the current economic downturn and provide an

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appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure, and in our view past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery.

- 3.8 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the household survey in 2004, with adjustments to reflect likely changes since 2004.
- 3.9 The total turnover of shops within Wycombe District is estimated based on penetration rates. These turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict information and Mintel's Retail Rankings 2008, which provides an indication of how individual retail units and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

### **Population and Spending**

- 3.10 The study area population for 2009 to 2026 is set out in Table 1B in Appendix B, based on the Office of National Statistics (2006) growth projections. Population within the study area is expected to increase between 2009 and 2026. Population within the study area is expected to increase between 2009 and 2026 by 5.8%. ONS's population projections are higher than Buckinghamshire County Council's projections previously adopted, which suggested a gradual decline in population after 2011. The ONS population figure for 2016 (268,818) is 3.3% higher than the BCC figure (260,282).
- 3.11 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.12 Table 2B in the Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Comparison forecasts of per capita spending are shown in Table 1C in Appendix C.
- 3.13 The levels of available spending are derived by combining the population in Table 1B per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.14 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of

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trading” 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. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and E-tailing (Retail Planner Briefing Note 6.0 – October 2008).

- 3.15 This Experian information suggests that non-store retail sales in 2008 is:
- 5.9% of convenience goods expenditure; and
  - 11.3% of comparison goods expenditure.
- 3.16 Experian predicts that these figures will increase to 8.1% and 13.9% by 2016. For convenience expenditure 5.8% of the 5.9% is estimated to be E-tailing, and the rest 0.1% is other forms of SFT e.g. mail order. E-tailing in 2004 was broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail businesses (0.5%). The E-tailing split for retail and non-retail businesses was approximately 70:30 in 2004.
- 3.17 For comparison expenditure in 2008, 9.1% of the 11.3% is estimated to be E-tailing, and the rest 2.2% is other forms of SFT e.g. mail order. E-tailing through retail businesses (e.g. Next and Argos) was 1.3% and for non-retail businesses 1.8% (e.g. Amazon) in 2004. The E-tailing split for retail and non-retail businesses was approximately 40:60 in 2004.
- 3.18 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. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 1.8% and 7.7% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.8% and 8.9% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.
- 3.19 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing. Therefore, it will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

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- 3.20 In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as “special forms of trading”, as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study because this expenditure does not affect the need for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 3.21 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects. Experian’s figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.
- 3.22 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.
- 3.23 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 16.6% from £472.78 million in 2009 to £551.51 million in 2026, as shown in Table 3B. The expenditure projection at 2016 (£496.49 million) is 12% higher than previously forecast in the 2006 update, because the ONS population projection is now 3.3% higher and allowing for inflation between 2006 to 2007 prices.
- 3.24 Comparison goods spending is forecast to double between 2009 and 2026, increasing from £821.92 million in 2009 to £1,696.01 million, as shown in Table 2C. These figures relate to real growth and exclude inflation. The expenditure projection at 2016 (£1,044.04 million) is 19.5% lower than previously forecast in the 2006 update, because actual growth in expenditure between 2004 to 2007 has been lower than previously forecast, the reduction for special forms of trading is now higher, Experian’s growth forecasts now reflect the economic downturn and there has been deflation between 2004 to 2007 prices.

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## **Existing Retail Floorspace 2009**

- 3.25 Existing convenience goods retail sales floorspace within the three town centres including freestanding out-of-centre food stores, is 21,247 sq m net as set out in Table 1A, Appendix A. This floorspace figure has not changed significantly since 2006 and excludes comparison sales floorspace within food stores (estimated to be 4,140 sq m net).
- 3.26 Comparison goods retail floorspace within the three town centres including retail warehouses in High Wycombe, the Eden development and comparison goods sales floorspace in food stores is set out in Table 4A, Appendix A. Total identified comparison sales floorspace in the District is estimated to be 117,364 sq m net, and has increased from 79,862 sq m net in 2006 due to recent development.

## **Existing Spending Patterns 2009**

### **Convenience Shopping**

- 3.27 The results of the household shopper survey undertaken in March 2004, have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix B. The revised level of convenience goods expenditure available for shops in the District at 2009 is £292.76 million (including an allowance for local shops/other retail units outside the three main centres), as shown in Tables 5B and 12B, Appendix B.
- 3.28 Company average turnover to sales floorspace densities are available for major food store operators. 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 Table 1A, Appendix A, 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 helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.
- 3.29 The total convenience goods benchmark turnover of all identified food stores/ convenience shops is £243.27 million, as shown in Table 1A, Appendix A. Our assessment suggests convenience goods expenditure available for these shops/stores (excluding local shops) in 2009 is £274.66 million, which suggests that existing convenience sales floorspace is 13% trading above the expected benchmark turnover, as shown in Table 5B, Appendix B.

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### **Comparison Shopping**

- 3.30 The revised estimated available comparison goods expenditure for facilities in Wycombe District at 2009 is £473.72 million, as shown in Tables 3C and 9C, Appendix C.
- 3.31 Company average sales densities (adjusted to include VAT) have been applied to the sales area of major comparison retailers within High Wycombe town centre and retail warehouses in High Wycombe, listed in Table 3A, Appendix A, and a benchmark turnover has been calculated. Again, this benchmark turnover is not necessarily the actual turnover of shops.
- 3.32 The total comparison goods benchmark turnover of all identified comparison floorspace in the District is £515.67 million, as shown in Table 3A, Appendix A. This figure excludes local shops/retail units outside the three main centres and retail parks.
- 3.33 Our assessment suggests comparison goods expenditure available for this floorspace (excluding local shops) in 2009 is £456.77 million. Existing comparison sales floorspace is estimated to be trading 11% below benchmark turnover in 2009. The below average trading levels appear to be consistent with the increased level of shop vacancies within High Wycombe, following the implementation of recent developments.

### **Quantitative Capacity for Additional Convenience Floorspace**

- 3.34 The level of available convenience goods expenditure in 2011, 2014, 2016, 2021 and 2026 is shown at Tables 7B, 8B, 9B, 10B and 11B in Appendix B, and summarised in Table 12B. These tables assume that the market penetration rates within the study area will change in the future, following the development of food store commitments. The adjusted market shares are shown in table 6B in Appendix B, which take into account planned or completed developments including the Tesco food superstore in Gerrards Cross and the enlarged Sainsbury store at Dovecot in High Wycombe.
- 3.35 The total level of convenience goods expenditure available for shops in the District between 2009 and 2026 is summarised in Table 12B in Appendix B. The benchmark turnover of existing and proposed convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates, as shown in Table 12B in Appendix B.
- 3.36 At 2016, the benchmark turnover of existing and proposed convenience floorspace is £283.13 million (Table 12B). Projected surplus expenditure at 2016 will be £14.83 million, as shown in Table 12B in Appendix B. This surplus is projected to increase to £29.59 million by 2026.
- 3.37 The expenditure projections have been converted into net sales floorspace projections based on a benchmark turnover density of £10,000 per sq m net

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for food stores in the three towns and £4,000 per sq m for local shops, as shown in Table 12B in Appendix B.

### **Comparison Shopping**

- 3.38 Major retail development in High Wycombe will have changed shopping patterns within the study area, and should have helped to reduce comparison expenditure leakage since 2004. This uplift in market share has been taken into account.
- 3.39 Further improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However, major development proposals in competing towns, e.g. in Aylesbury, Bicester, Bracknell, Hemel Hempstead, Milton Keynes, Watford and Oxford, will limit the ability of shopping facilities in the District to increase their market share of expenditure in the long term. Future market shares are expected to remain constant, but have been adjusted to reflect developments completed between 2004 and 2009. The market share adjustments are based on the following assumptions:
- developments proposed after 2004 will have increase the District's share of comparison expenditure within the study area from 47% to 54.5%; and
  - existing comparison floorspace within the District is currently trading 5.3% below expected benchmark turnover.
- 3.40 The projections of surplus comparison expenditure in Table 9C also assume that existing floorspace is trading below benchmark levels, and in the future trading performance will return to benchmark levels, i.e. existing trading above benchmark levels will be available to support new floorspace in the future.
- 3.41 Based on these assumptions, we have provided projections of comparison goods expenditure available to shops in the District at 2009, 2011, 2014, 2016, 2021 and 2026 as shown in Table 3C, 4C, 5C, 6C, 7C and 8C in Appendix C.
- 3.42 The growth in comparison goods expenditure available for shops in the District between 2009 and 2026 is summarised in Table 9C, in Appendix C. Future available expenditure is compared with the turnover of existing and proposed comparison retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 9C.
- 3.43 Table 9C assumes that the benchmark turnover of comparison floorspace will not increase between 2009 to 2011 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the District is expected to increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 4.6% per annum is achieved. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of

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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.

- 3.44 The projections in Table 9C suggest the existing 2009 comparison expenditure deficit (-£58.51 million) will increase up to 2011 (-£95.7 million) due to the implementation of commitments (as shown in Table 5A - Gas Works, Lily's Walk and Dovecot). However, continued population and expenditure growth should reduce this deficit and there should be a small deficit by 2016 (-25.35 million).
- 3.45 Deficit/surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 9C in Appendix C. The figures suggest there is a current over-supply of 13,371 sq m net (17,829 sq m gross). The figures in Table 9C suggest that recent development at Eden High Wycombe and Wycombe Marsh has absorbed recent comparison expenditure, and with current commitments will absorb future growth in High Wycombe up to and beyond 2016. However, continued growth in expenditure beyond 2016 could be available for further floorspace.

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## Conclusions and Recommendations

### Meeting Shopping Needs in Wycombe District

- 4.1 PPS6 indicates that local planning authorities should assess need for additional floorspace over the plan period, and for five year periods within it. PPS6 goes on to indicate that in planning for growth in their town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly.
- 4.2 For development control purposes in the next few years, i.e. the projections up to 2016 provide a basis for considering applications that would be completed within a five year period. For future planning policy and site allocations in the LDF it is necessary to seek to identify opportunities to accommodate growth at least up to 2016 in order to allow time for the LDF process. However, the longer term growth projections up to 2021/2026 should be treated with caution and monitored and updated as necessary.

### Convenience Retail Projections

- 4.3 The analysis of convenience retail shopping patterns in 2009 as set out in Section 3 of this report indicates that existing floorspace in the District is trading above expected levels. Food store commitments within and surrounding the District are expected to reduce the expenditure surplus to £12.2 million in 2011. This surplus is concentrated primarily in Marlow. Continued expenditure growth between 2011 and 2016 will increase the expenditure surplus to £14.83 million in 2016, which again is primarily concentrated in Marlow (£8.81 million).
- 4.4 These figures take into account Sainsbury's proposals at West Street in Marlow, and the proposed closure of Sainsbury Local.
- 4.5 The absence of a global quantitative capacity within the District as a whole would not necessarily preclude qualitative improvements to convenience shopping, particularly where proposals are located within existing centres or serve an identified area of deficiency. For example, there may be scope to improve local shopping provision, particularly in major new residential developments. The discount food sector remains under-represented within the District and a qualitative case for this type of development could be demonstrated, subject to the application of the sequential approach to site selection, retail impact and accessibility criteria in PPS6.

4.6

The quantitative capacity analysis indicates there could be scope for the following convenience goods floorspace:

<b>Area</b>	<b>Sales Floorspace Sq M Net By 2016</b>	<b>Sales Floorspace Sq M Net By 2026</b>
High Wycombe	300	1,327
Marlow	859	993
Princes Risborough	152	270
Local centres/other	135	226
<b>Total</b>	<b>1,446</b>	<b>2,815</b>

#### **Comparison Retail Projections**

4.7

The analysis of comparison retail shopping patterns indicates that the Eden development, Wycombe Marsh Retail Park and other commitments will absorb comparison expenditure growth in High Wycombe up to 2016. There appears to be no need to deliver further major comparison retail development in High Wycombe in the short term. Within Marlow and Princes Risborough there may be modest capacity for further comparison floorspace. In the medium to long term (up to 2016 and beyond) the quantitative capacity analysis indicates there could be scope for:

<b>Area</b>	<b>Sales Floorspace Sq M Net (Gross) By 2016</b>	<b>Sales Floorspace Sq M Net (Gross) By 2026</b>
High Wycombe	0 (0)	41,990 (55,987)
Marlow	118 (157)	4,142 (5,523)
Princes Risborough	263 (351)	1,835 (2,447)
Local centres/other	476 (635)	2,457 (3,276)
<b>Total</b>	<b>857 (1,143)</b>	<b>50,425 (67,233)</b>

4.8

These floorspace projections relate to retail expenditure growth and do not include growth in the wholesale trade sector. Nevertheless, some wholesale outlets/trade counters are open to the public and new facilities of this kind will

have an impact on the retail capacity figures. The implications of new wholesale/trade counter proposals should be carefully considered. In general retail trade through wholesale businesses e.g. Jewson are normally counter-balanced by wholesale trade made through retail businesses e.g. B&Q. This balanced will need to be monitored in the future.

### Accommodating Future Growth

- 4.9 Government guidance indicates that local authorities should positively plan for growth, and that the quantitative need for retail and other key town centre uses is a key consideration. The projections in this study indicate that recent development and commitments can meet a significant proportion of the growth up to 2016. The strategy in the short to medium terms should be one of consolidation. In the longer term (after 2016) the Council should seek to identify longer term opportunities for retail and leisure development within Wycombe's town centres.
- 4.10 The existing stock of premises is expected to have some role to play in accommodating projected growth. The retail capacity analysis assumes that existing floorspace can increase its turnover to sales floorspace densities and the floorspace projections reflect this assumption. In addition to the growth in sales densities, vacant shops should help to accommodate future growth.
- 4.11 The Council's land use surveys indicate the following level of vacant shop (Class A) floorspace in each of the three main centres:

<b>Area</b>	<b>Vacant Floorspace Sq M Gross (Rate %) In 2006/07</b>	<b>Vacant Floorspace Sq M Gross (Rate %) In 2008/09</b>
High Wycombe	9,115 (7.4%)	23,802 (14.5%)
Marlow	516 (2.0%)	1,487 (6.0%)
Princes Risborough	286 (2.1%)	1,314 (9.8%)
<b>Total</b>	<b>9,917 (6.1%)</b>	<b>26,603 (13.2%)</b>

- 4.12 The vacancy rate has increased in recent years and there is potential for vacant shop units to meet some of the projected capacity for new retail floorspace.
- 4.13 The increase in vacant floorspace in High Wycombe is primarily due to the implementation of the Eden development, where there are a number of units still available. Vacancy levels have also increased elsewhere in the centre town centre, e.g. the Chilterns Centre and White Hart Street. The High Wycombe vacant floorspace figure (23,802 sq m) includes the former Marks & Spencer unit, which has now been occupied by Primark. However, the figure does not

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include the recent closure of Woolworth. Vacant retail floorspace in High Wycombe town centre is currently around 18,000 sq m gross. The out of centre MFI retail warehouse has also closed (about 2,000 sq m gross).

4.14 If the vacancy rate in High Wycombe town centre can return to 2006 levels (7.4%) then about 6,000 sq m gross of retail floorspace could be reoccupied, which could accommodate some of the High Wycombe comparison retail floorspace projection between 2016 to 2021. The reoccupation of the MFI unit could also accommodate growth. The priority in High Wycombe in the period up to 2016 is:

- the reoccupation of vacant shop units in the town centre;
- the implementation of the Dovecot development; and
- the implementation of the Gas Works, Lily Walk commitment.

4.15 In Marlow and Princes Risborough there appears to be scope for vacant floorspace to meet the comparison floorspace projections up to 2016. There may also be opportunities for small scale development within the two town centres.

#### **High Wycombe Town Centre**

4.16 The 2004 study identified a number of opportunities to expand town centre uses within and adjacent to High Wycombe town centre, these included:

- the Buckinghamshire and Chiltern College;
- High Wycombe Railway Station;
- the Swan Theatre forecourt area;
- Buckingham House;
- Octagon Parade;
- Corner of Bridge Street/Oxford Road;
- Corner of Bridge Street/Desborough Road/Bus Depot to rear;
- West End Road/Desborough Road; and
- The Richardson Street/Baker Street area.

4.17 The Buckinghamshire and Chiltern College site is unlikely to be available for redevelopment. Some of the other opportunity sites could meet emerging growth between 2016 and 2021 and 2026.

4.18 A number of smaller scale opportunities, well linked to the town centre, were identified as having good potential for new retail and leisure floorspace, i.e. the Railway Station, the Swan Theatre Forecourt, Buckingham House and the corner of Bridge Street/Oxford Street.

#### **Marlow Town Centre**

4.19 Within Marlow town centre, the 2004 study indicated that development opportunities are limited due to the historic character and structure of the town

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centre, and also due to the scale of retail development proposed in High Wycombe (particularly comparison retail). The Riley Road site/proposed Sainsbury store has already been taken into account in this assessment. The Dean Street car park was also identified as a possible development site, but the need to find replacement town centre car parking spaces and the separation from existing shopping frontages are major constraints. The Portlands area is currently allocated for residential use but could be developed for retail use if site constraints can be overcome.

#### **Princes Risborough Town Centre**

4.20

Within Princes Risborough three small to medium scale opportunities were identified. The Budgen's food store area was identified as the most likely opportunity to improve convenience goods shopping provision in Princes Risborough. This opportunity has now been occupied by Marks & Spencer. Two other opportunities either side of the High Street were identified where new floorspace could be accommodated.