

# **Buckinghamshire Employment and Retail Evidence**

## **Part B Retail Evidence Study - Volume 1 - Main Report**

### **Final Report**

Buckinghamshire Council

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**LICHFIELDS**

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## 1.0 Introduction

### Overview

- 1.1 Lichfields was commissioned by Buckinghamshire Council to prepare an evidence study for the emerging Local Plan for Buckinghamshire. This evidence includes two broad inter-related areas of analysis. This report sets out retail and town centre uses needs evidence. This report should be read alongside the Part A Employment Evidence Study given the inter-relationship between many employment, retail and town centre planning issues.
- 1.2 The two studies assess the qualitative needs for land and floorspace for economic activity over the plan period to 2045. They will also advise on the retail sector and the needs for retail floorspace at five-year intervals to 2045.
- 1.3 This report has been prepared in line with the National Planning Policy Framework (NPPF, December 2024) relating to the need to ensure the vitality of town centres (paragraph 90) and the evidence to assess the need for economic development (paragraph 86). The assessment also takes account of the Planning Practice Guidance (PPG). Buckinghamshire Council is currently preparing a Local Plan and this retail evidence will inform its preparation.
- 1.4 The analysis presented herein was prepared primarily in mid-2023, and it was partially updated in early 2025 to account for the NPPF and standard method for assessing housing needs published in December 2024, as well as to take account of the latest available retail expenditure forecasts at the time of updating.
- 1.5 The retail and town centre related objectives of the study are to assess the following matters:
- provide information and recommendations in relation to land use policies and allocations for: Use Class E (except for E(d) and E(e) – indoor sport and medical); Use Class F2(a) in relation to the role of local shops; and Sui Generis uses typically found in employment areas and town centres;
  - advise whether the traditional approach to economic and retail forecasting is still robust given economic uncertainties and whether there are alternative approaches;
  - identify a baseline requirement of retail floorspace needed in Buckinghamshire over the Local Plan period to 2040 using traditional forecast techniques;
  - take account of the context provided by Buckinghamshire Growth Board's Strategic Vision to 2050 (Succeeding as A Place - Vision for Buckinghamshire to 2050), the Growth Board's Recovery and Growth Proposal (2020);
  - take account of the context provided by the emerging Regeneration Framework and other local activities;
  - assess the retail capacity of specified town centres and other locations in Buckinghamshire and advise on the retail hierarchy;
  - review the future suitability of allocations for new retail floorspace, the defined 14 town/shopping centres, frontage policies (primary/secondary) and Article 4 Directions;

- advise on the need for a bespoke threshold for local consideration of out of centre retail impacts;
- provide a robust response to the observed and future implications of the Covid-19 pandemic, including retailing, town centres and the local economy within Buckinghamshire;
- take account of key global, national and local influences on the Buckinghamshire Local economy;
- consider the views of relevant local stakeholders, e.g., via a stakeholder workshop; and
- provide outputs that can be interpreted at a smaller spatial scale within Buckinghamshire, e.g., for main towns and other centres.

## **Report structure**

- 1.6 Section 2 of this report provides an updated overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for Buckinghamshire should reflect these underlying trends.
- 1.7 Section 3 examines the existing hierarchy of centres within Buckinghamshire and the surrounding area. Appendix 6 provides more detailed centre health checks for 14 key designated town centres in Buckinghamshire, as follows:
- Amersham Old Town;
  - Amersham on-the-Hill;
  - Aylesbury;
  - Beaconsfield Old Town;
  - Beaconsfield New Town;
  - Buckingham;
  - Chesham;
  - Gerrards Cross;
  - Great Missenden;
  - High Wycombe;
  - Marlow;
  - Princes Risborough;
  - Wendover; and
  - Winslow.
- 1.8 These 14 centres were selected by the Council because they are typically main centres with an important local role for convenience shopping and provide other food and drink, leisure and other services. This list includes the main town centres of High Wycombe, Aylesbury and Chesham. Smaller town and village centres are not included within the study, although appropriate policy approaches for the viability and vitality are addressed.

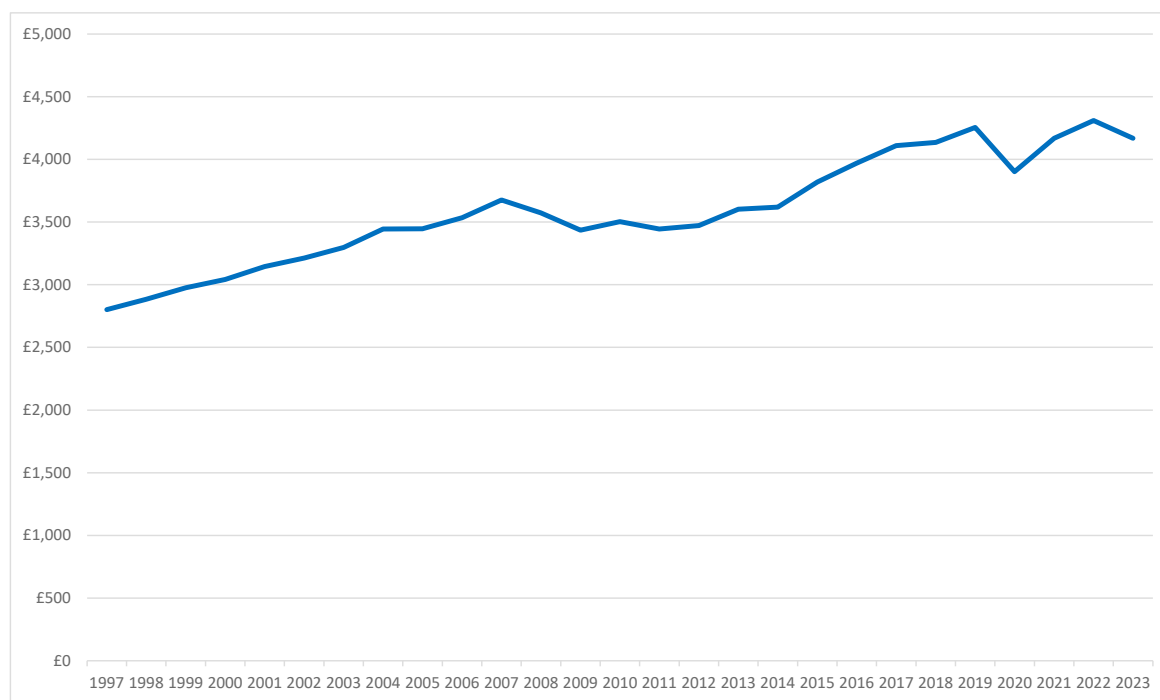
- 1.9 Town centre health checks have been undertaken for the 14 main centres, as set out in Appendix 6 to 19. A strengths, weaknesses, opportunities and threats (SWOT) analysis is included in the centre health checks. This analysis is based on Goad land uses surveys undertaken during 2022; visitor's views established from the results of household telephone survey (February 2023) and Lichfields' own site visits and desk research. Future priorities for each centre have been identified adopting the Institute of Place Management's 25 vital and viable factors. The health check and SWOT analysis have informed these priorities. Factors identified as high priority are areas of weakness that require immediate action/investment. Low priority factors are areas of existing strength where action/investment is currently unnecessary.
- 1.10 Section 4 sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. The capacity tables are shown in Appendix 2, 3 and 4.
- 1.11 Section 5 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses. The capacity tables are shown in Appendix 5.
- 1.12 Section 6 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).
- 1.13 Section 7 summarises the main conclusions and recommendations.

## 2.0 Recent national trends and key changes

### Implications of Brexit, Covid-19 and other trends

- 2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2023 is shown in Figure 2.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced significantly, particularly comparison goods retail floorspace. Comparison goods expenditure per capita dropped sharply in 2020 due to the impact of Covid-19 lockdowns, but expenditure recovered to pre-Covid levels in 2022. However, expenditure per person declined in 2023 due to the on-going cost-of-living and energy crisis.

Figure 2.1 Comparison goods expenditure per head in the UK (constant 2023 prices)



Source: Experian Retail Planner Briefing Note 22 (March 2025)

- 2.2 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2024, 2025 and 2026) for retail and leisure reflect the effects of Brexit, Covid-19 pandemic and cost-of-living crisis. The on-going cost of living crisis will also suppress expenditure growth in the short term.
- 2.3 The main implications of Brexit, Covid-19 and the cost-of-living crisis for the evidence base studies were as follows:



- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short-term impacts on the mix of town centre uses and customer behaviour that distorted levels of expenditure during 2020, 2021 and 2022; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

- 2.4 The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost-of-living crisis. The longer-term structural implications are harder to predict and quantify at this stage. The post Covid-19 recovery has been slow and has been suppressed by the on-going cost-of-living crisis.
- 2.5 Operators have continued to face elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit during the Covid-19 crisis. Short-term supply chain disruption led to inflationary pressure, which had an impact of consumer demand.
- 2.6 Retailers with infrastructure to fulfil on-line orders/home delivery benefitted during the Covid-19 crisis. There has been a structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.
- 2.7 As a result of these trends, there has been a spike in town centre vacancies with many businesses failing, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis exacerbated difficult trading conditions. Many national operators have announced job losses and store closures.
- 2.8 Reflecting these trends, Experian's latest forecasts (published in March 2025) suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping.

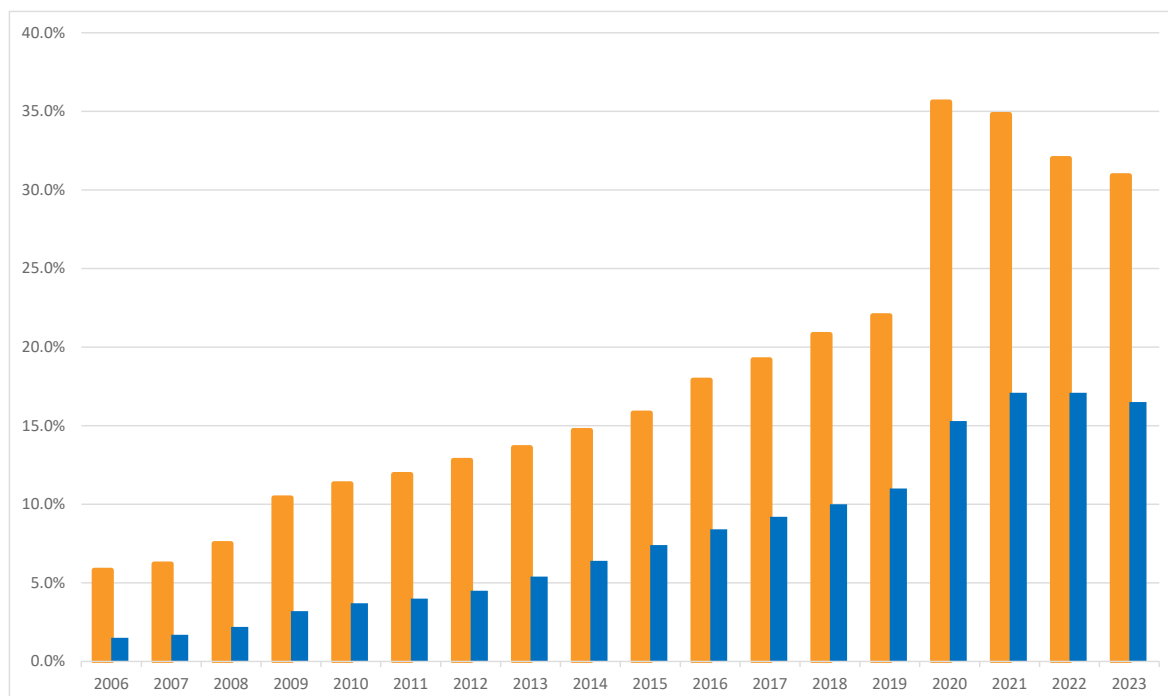
### **Experian's latest retail expenditure national forecasts**

- 2.9 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 22 - March 2025). The study sets out expenditure projections during five-year intervals up to 2043.
- 2.10 The current cost-of-living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2023, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian indicates a continued decline during 2024 and 2025. Low growth is predicted during 2026, but higher annual growth is expected in the longer-term.
- 2.11 Planning based on long-term expenditure growth projections up to and beyond ten years has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of

growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.

- 2.12 For convenience goods, Experian's latest forecasts suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020. Convenience goods expenditure per capita is expected to continue to fall during 2025 and 2026. In the longer-term a small decline is forecast at -0.3% per annum between 2027 to 2031 and -0.2% per annum thereafter. Despite this forecast reduction in total expenditure per capita, Experian expects continued growth in non-store sales. Any need for new convenience goods retail floorspace in the District is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.
- 2.13 Comparison goods expenditure per head is predicted to fall by -1% during 2024 but will increase marginally by 1.4% during 2025 and 2026. Modest growth is expected in the longer-term (between 2.5% to 3.6% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.14 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.
- 2.15 Experian's Retail Planner Briefing Note 22 (March 2025) suggests non-store retailing's market share increased from 17.8% in 2019 to 27.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 22% to 34.8% and convenience good sales increased from 11% to 17.1% between 2019 and 2021. However, Experian indicates comparison goods non-store sales figure fell during the post Covid lockdown period in 2022 and 2023, reducing from 34.8% to 30.9%. Convenience goods non-store sales also fell to 16.5%. Nevertheless, the 2023 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 2.2.
- 2.16 Between 2006 and 2023 the proportion of comparison goods non-store sales increased by over 25 percentage points from 5.8% to 30.9%. The proportion of convenience goods non-store sales increased by 15 percentage points but increased by over ten times, starting from a lower 2006 base of only 1.5%. Experian data shows the sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022 and 2023.
- 2.17 This data suggests the proportion of retail sales spent on-line will continue to grow, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased minimum spend thresholds for free deliveries may benefit traditional retailing.

Figure 2.2 Non-store sales as a percentage of total sales in the UK



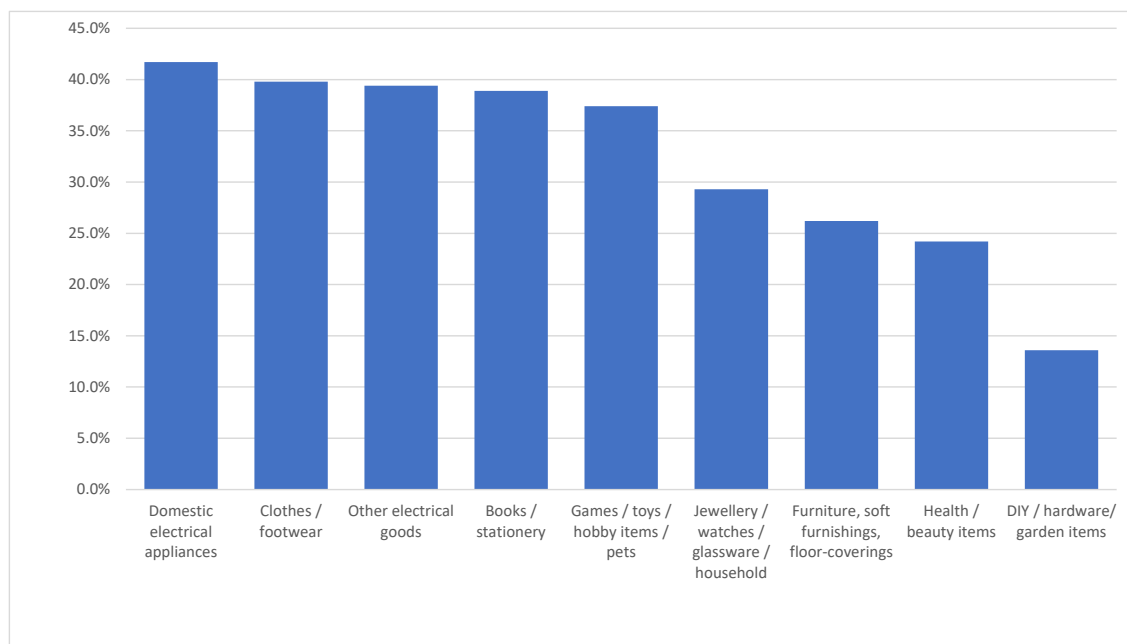
Source: Experian Retail Planner Briefing Note 22 (March 2025) – Figure 5  
comparison goods spending in orange / convenience goods spending in blue

- 2.18 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with previous trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.
- 2.19 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

### Internet and home shopping in Buckinghamshire

- 2.20 The household survey results for 1,800 completed interviews during February 2023 across the Buckinghamshire study area as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The survey results suggest 32.9% of respondents do most of their household's non-food shopping on-line and 17.4% of households did their last main food and grocery shop via the internet/delivery. The comparison goods products purchased by households online are shown in Figure 2.3. These survey results indicate that a broad range of non-food goods are purchased on-line, but clothing /footwear and electrical appliances are most often purchased online.

Figure 2.3 Comparison goods items last purchased via the internet in Buckinghamshire (% of all households)

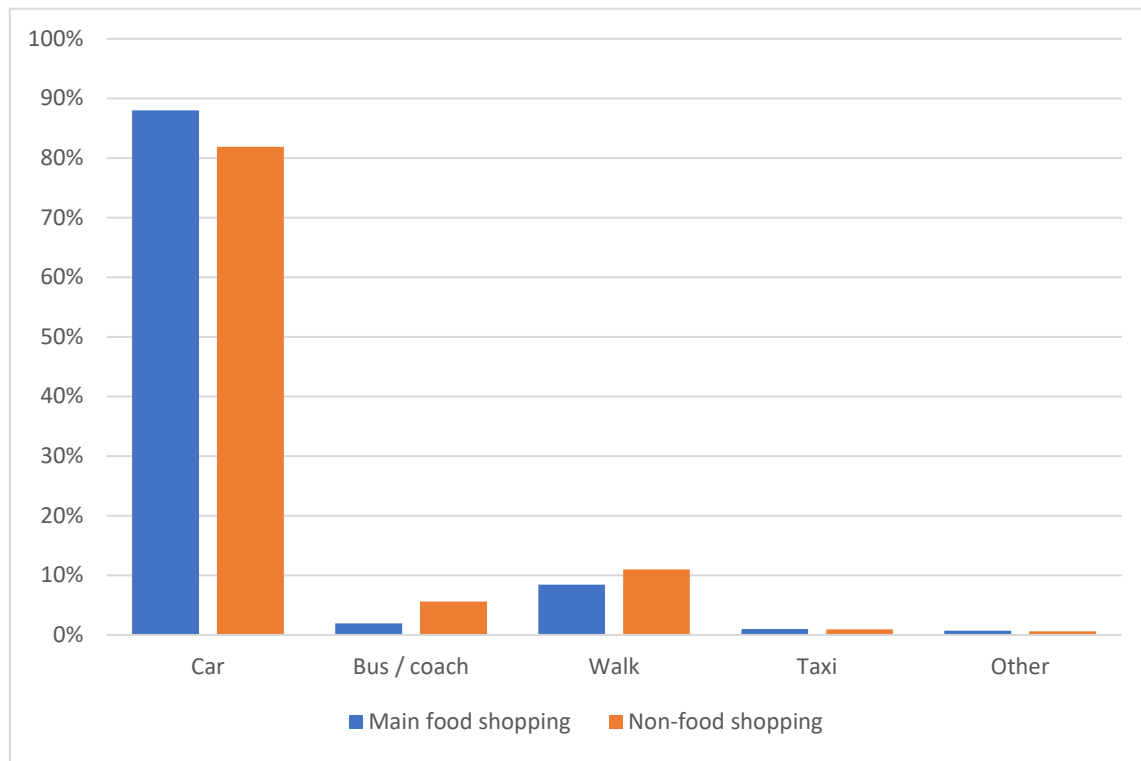


Source: NEMS household shopper survey February 2023

### Mode of travel and frequency of trips

- 2.21 As indicated above, 32.9% of respondents do most of their non-food shopping on-line and 17.4% did their last main food and grocery shop via the internet/delivery. Experian suggests over 25% of retail sales was via non-store activity in 2023. These figures suggest many households do not need to travel to undertake food and non-food shopping.
- 2.22 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car for both food and non-food shopping (excluding internet/home shopping) as shown in Figure 2.4. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.
- 2.23 Car usage is generally higher for main food shopping than for non-food shopping because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus travel and walking is slightly higher for non-food shopping.

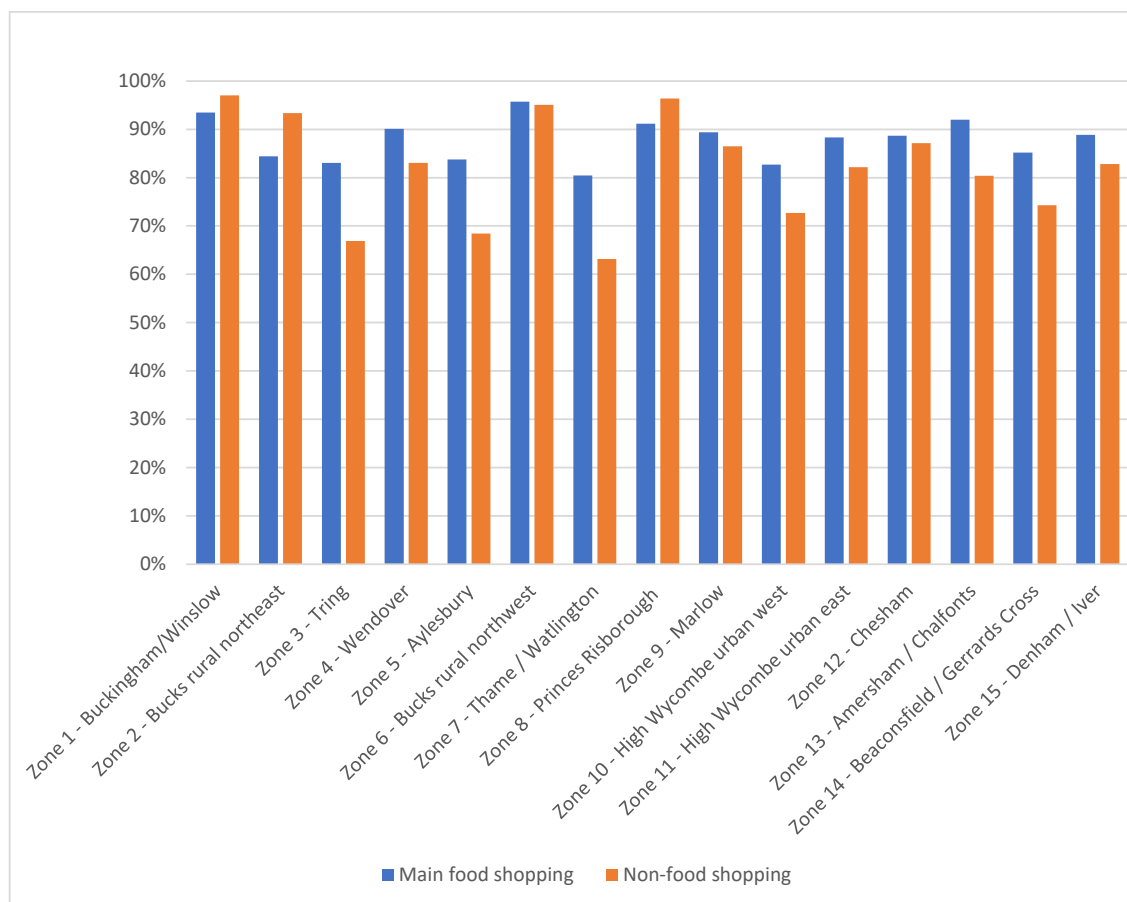
Figure 2.4 Mode of travel for non-food and main food shopping in Buckinghamshire (% of travelling household respondents)



Source: NEMS household shopper survey February 2023

- 2.24 Car travel for food and non-food shopping was high across all zones, rural and urban, as shown in Figure 2.5. Car travel was slightly lower than average in the main urban zones i.e. Zone 5 – Aylesbury, Zone 10 – High Wycombe (west) and Zone 11 – High Wycombe (east).
- 2.25 Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally over 80% of households for main weekly shopping. Lower levels of car usage in urban areas are normally due to higher levels of access to shopping facilities, both on foot and via public transport.

Figure 2.5 Car borne travel for shopping by Zone in Buckinghamshire (% of travelling household respondents)



Source: NEMS household shopper survey February 2023

## Demand for town centre floorspace

- 2.26 Experian undertakes land use surveys for town centres across the UK and presents this information on Goad Plans for each centre. This Goad Plan data can be used to monitor national trends in the mix of uses and shop vacancy rates.
- 2.27 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street during the past 20 years. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.7% in 2024. There was a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic and the growth in on-line shopping. The more recent impact of higher inflation and the cost-of-living crisis also constrained consumer demand.
- 2.28 Information collected by the Council's Economy, Investment and Regeneration Service (EI&R) indicate there were 154 vacant units in the 14 main centres before Covid-19 lockdowns. The number of vacant units increased to 241 during the Covid crisis (June 2020 to March 2021). The latest figures (quarter 4 – 2024) was 188 vacant units, still above the pre-Covid baseline, of which 67 units (36%) were either under offer, subject to planning or part of wider redevelopment schemes.

- 2.29 Goad Plan land use surveys during 2022 and Lichfields' surveys in Great Missenden and Winslow recorded a higher number of vacant units i.e. 259 vacant units in the 14 main centres. The Goad and EG&R data is not directly comparable due to different areas of coverage and the different survey dates. The Goad based average shop unit vacancy rate in the main centres was 12.6%. This figure excludes Class B, D1/D2 and residential uses in town centres. This Buckinghamshire shop vacancy rate is marginally higher than the UK pre-Covid-19 average (12.4%), but lower than the current post-Covid national average (14.4%).
- 2.30 Previous studies for the former district authority areas suggest the number of vacant shop units has increased in the last 5-10 years. In Aylesbury town centre the number of vacant units has increased significantly from only 15 units in 2014 to 55 units in 2022, but EG&R's latest figures for 2023 suggest only 34 vacant units. In High Wycombe, Marlow and Princes Risborough the number of vacant shop units increased from 78 units in 2013 to 106 units in 2022. This trend is mirrored in the South East Bucks area. The combined number of vacant shop units in Amersham on-the-Hill, Beaconsfield (Old and New Town), Chesham and Gerrards Cross has increased from 34 in 2016 to 49 units in 2022.
- 2.31 This increase in shop vacancy levels in Buckinghamshire is consistent with national trends. The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. There has also been a decline in the number of national chains due to mergers and failures and a shift towards more independent traders. The national decline in the number of comparison goods retail outlets and chain stores within town centres has been evident in Buckinghamshire's town centres. Previous studies suggest the number of comparison goods shops has decreased significantly in the last 5-10 years.
- 2.32 In Aylesbury town centre the number of comparison goods decreased by nearly 28%, from 112 units in 2014 to 81 units in 2022. In High Wycombe, Marlow and Princes Risborough the number of comparison goods shops decreased by 24%, from 305 units in 2013 to 232 units in 2022. The combined number of comparison goods shops in Amersham on-the-Hill, Beaconsfield (Old and New Town), Chesham and Gerrards Cross decreased by 21%, from 270 units in 2016 to 214 units in 2022.
- 2.33 In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets. A more detailed analysis of the mix of uses in Buckinghamshire's main centres compared with the national picture is set out in Section 3.
- 2.34 Property owners, landlords and funds came under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost-of-living crisis and will continue in the short-term.
- 2.35 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

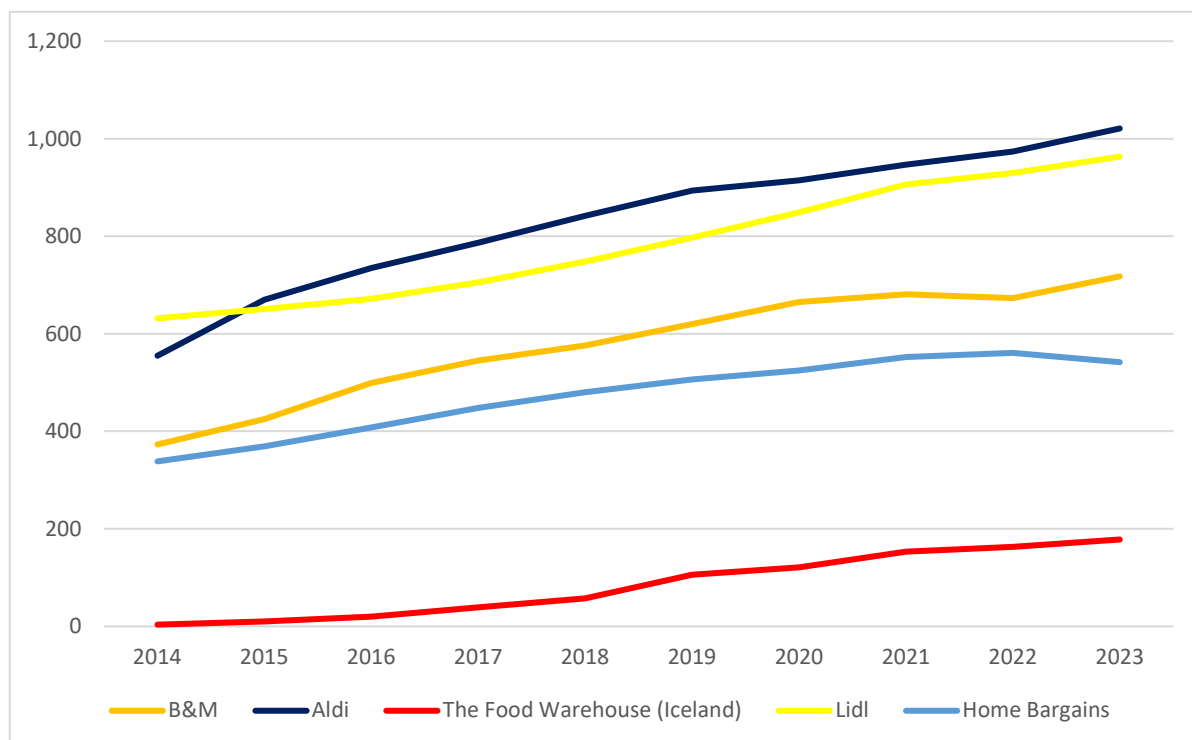
- 2.36 The number of major town centre retail and leisure developments has slowed significantly over the last decade. Many schemes planned before the credit crunch in 2009 were abandoned or delayed indefinitely. Access to private sector finance is now severally rationed and most town centre mixed use schemes are now residential led.
- 2.37 Central Government's policy support for town centres has introduced several funding schemes designed to help centres redevelop and to support local economic growth. These have included the High Streets Fund, the Towns Fund in England, the Community Ownership Fund and Levelling Up fund UK-wide.
- 2.38 In the short to medium term future access to private sector finance for retail/leisure town centre development in Buckinghamshire will be restricted. The availability of future Central Government funding initiatives may also provide opportunities in Buckinghamshire. Future bids for funding sources in Buckinghamshire in the future should be based on sound evidence and a clear strategy for town centres.

### **Food store operators**

- 2.39 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 2.40 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled.
- 2.41 Several proposed larger food superstores were not implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more home working during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.
- 2.42 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade as shown in Figure 2.6. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years.
- 2.43 These trends are evident in Buckinghamshire with six Lidl stores, five Aldi stores, two B&M and a Home Bargain store. Lidl's recent reoccupation of a Waitrose store in Marlow is evidence of this trend. A further Lidl store is now proposed in Aylesbury (Buckingham Road) and additional Aldi stores are proposed in High Wycombe (Crest Road) and Old Amersham.
- 2.44 The number of small independent food and grocery shops in town centres declined over many years, as the number of large food stores increased. In the last decade this trend slowed and has to some extent reversed with some customers preferring to visit specialist shops e.g. butchers, bakers and greengrocers.



Figure 2.6 Number of discount stores in the UK



Source: GlobalData and A+A's Storepoint database (2014 to 2023)

## Comparison retailers

- 2.45 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to re-emerge for the foreseeable future.
- 2.46 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains. It may only be possible to control this trend in Buckinghamshire, if the original planning permissions restrict the type of retail permitted on retail warehouse parks by appropriate planning conditions.
- 2.47 The retail warehouse sector is reasonably well represented in Buckinghamshire with a concentration of large stores in Aylesbury (e.g. Aylesbury Shopping Park, Vale Retail Park and Broadfields Retail Park) and High Wycombe (e.g. Wycombe Retail Park, Bellfield Road and Knaves Beech).

- 2.48 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in Buckinghamshire with the focus of comparison goods national multiples present in Aylesbury and High Wycombe and a limited provision in other smaller centres.
- 2.49 In general, operator demand for space has decreased significantly during the last ten years and, of those national multiples looking for space, many prefer to locate in larger centres e.g. Milton Keynes, Oxford, Reading and Watford. Most centres in Buckinghamshire, apart from Aylesbury and High Wycombe, are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. The availability of modern, flexible and affordable space to attract national operators will be important, particularly in Aylesbury and High Wycombe.
- 2.50 Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.
- 2.51 The continuation of these trends will influence future operator space requirements in Buckinghamshire. Smaller vacant units and lower tier centres may be less attractive for new multiple occupiers but should provide an opportunity to attract locally distinctive independent traders and non-retail services looking to serve local catchment areas.

### **Charity and discount shops**

- 2.52 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E).
- 2.53 In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Buckinghamshire with a strong presence of charity shops in most centres. There are 65 charity/second-hand shops within the 14 main centres in Buckinghamshire, 10.1% of all comparison shops, which is similar to the UK average of 9.9%.
- 2.54 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

### **Non-retail services**

- 2.55 A diverse range of non-retail service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The range non-retail service uses includes the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

- 2.56 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. These trends have not been particularly evident in Buckinghamshire.
- 2.57 The number of banks and building societies has reduced steadily for many years, accelerated by the growth in on-line banking. Goad Plan data suggests nationally the proportion of town centre units occupied by banks/building societies was 4.6% in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2024. Many smaller centres no longer have banking facilities.
- 2.58 Banking hubs have emerged and enable major banks to maintain a high street presence whilst reducing costs, with different banks sharing the same unit and operating on different days. The first banking hub in Buckinghamshire was opened in Buckingham in December 2023, and another has opened in Marlow in June 2025. Continued rationalisation of bank and financial services could lead to an increase in town centre vacancies, whilst banking hubs could provide further opportunities to fill vacancies in larger centres.
- 2.59 Seven of the 14 main centres in Buckinghamshire have no banks or building societies and most of the facilities in the other centres area concentrated in Aylesbury and High Wycombe. Former bank premises can often be difficult to convert to alternative uses and this has created long-term voids in some centres.
- 2.60 There were 21 betting shops in the 14 main centres in Buckinghamshire in 2022, which is just over one percent of all units, but comparable with the national average. The main concentrations of betting shops are in Aylesbury and High Wycombe town centres.
- 2.61 There were 103 hot food takeaways in the 14 main centres in Buckinghamshire in 2022, 5% of all units, which is below the UK national average of 6.3%. High Wycombe (8.9%) and Winslow (8.9%) have the highest proportions of hot food takeaways. Some Councils have introduced planning policies to control the number of new hot food takeaways, particularly near schools, as part of Healthy Place Shaping initiatives. The proportion of hot food takeaways often reflects the socio-economic characteristics of the areas and levels of deprivation.
- 2.62 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully

monitored. The cost-of-living crisis may increase demand for change from retail to other uses.

## **Leisure and hospitality**

- 2.63 Nationally, the food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage during the last decade, but primarily in larger centres.
- 2.64 The hospitality sector has experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly but have experienced difficulties more recently. This hospitality sector in town centres was the most adversely affected by the Covid-19 crisis.
- 2.65 The key categories for the food and beverage offer are:
- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
  - *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
  - *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
  - *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.
- 2.66 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid crisis. This trend was evident in Buckinghamshire, and this sector appears to have recovered well in Buckinghamshire following the Covid-19 crisis, perhaps bucking national trends. More detail on the mix of uses in Buckinghamshire is set out in Section 3.

## **Pop-up spaces**

- 2.67 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis but has not been particularly evidence in Buckinghamshire. There may be opportunities to explore this approach with landlords where there are high levels of long-term vacancies.

## National policy and other changes

- 2.68 The NPPF (December 2024) indicates planning policies should (para. 90):
- define a network and hierarchy of town centres and promote their long-term vitality and viability;
  - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations;
  - retain and enhance existing markets and to re-introduce or create new ones;
  - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead;
  - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre or explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
  - recognise that residential development often plays an important role in ensuring the vitality of centres.
- 2.69 The NPPF recognises that diversification is key to the long-term vitality and viability of town centres. Accordingly, planning policies should clarify 'the range of uses permitted in such locations.
- 2.70 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and the cost-of-living crisis has elevated this debate.
- 2.71 Changes to UCO town centre use classes in 2020 allow greater flexibility for uses to change within town centres without the need to obtain planning permission, which has significant implications for shop frontage planning policies. It restricts the ability of local planning authorities to control the mix of uses and retain uses previously protected e.g. Class A1 retail. The UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
  - Class F.1 (Learning and non-residential institutions); and
  - Class F.2 (Local community).
- 2.72 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.73 There is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

- 2.74 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues.
- 2.75 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission, which could have implications for the effectiveness of retail impact and sequential test policies.
- 2.76 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development rights. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.77 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area.
- 2.78 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.

## Summary

- 2.79 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. However, the Goad based shop vacancy rate in Buckinghamshire was relatively high in 2022, only marginally below the UK average. More recent EG&R data suggests shop vacancy rates have improved.
- 2.80 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.
- 2.81 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad UK shop vacancy rate has increased to nearly 15% and therefore a cautious approach to future development needs is required. The implications of the cost-of-living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.
- 2.82 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping,

for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out".

2.83 Changes to the NPPF, UCO and PDR have been introduced to allow more flexibility for changes of use in town centres. These changes should:

- reduce the ability of local planning authorities to control the mix of some uses;
- give more potential protection for other uses such as learning, non-residential and community facilities e.g. museums, public halls, sports facilities, local shops;
- give more control over 'bad neighbour' town centre uses e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues; and
- may have unintended consequences for the effectiveness of retail impact and sequential test policies.

## 3.0 The shopping hierarchy

### National policy

- 3.1 The latest NPPF (paragraph 90) indicates planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability by allowing them to grow and diversify. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

### Main centres in Buckinghamshire

- 3.2 The adopted development plans of the four Buckinghamshire authority areas identified 26 town, district and local centres, but the categorisation of these centres was not entirely consistent. The development plan categorisation of centres and the total number of retail/service units is shown in Table 3.1 and Figure 3.1.

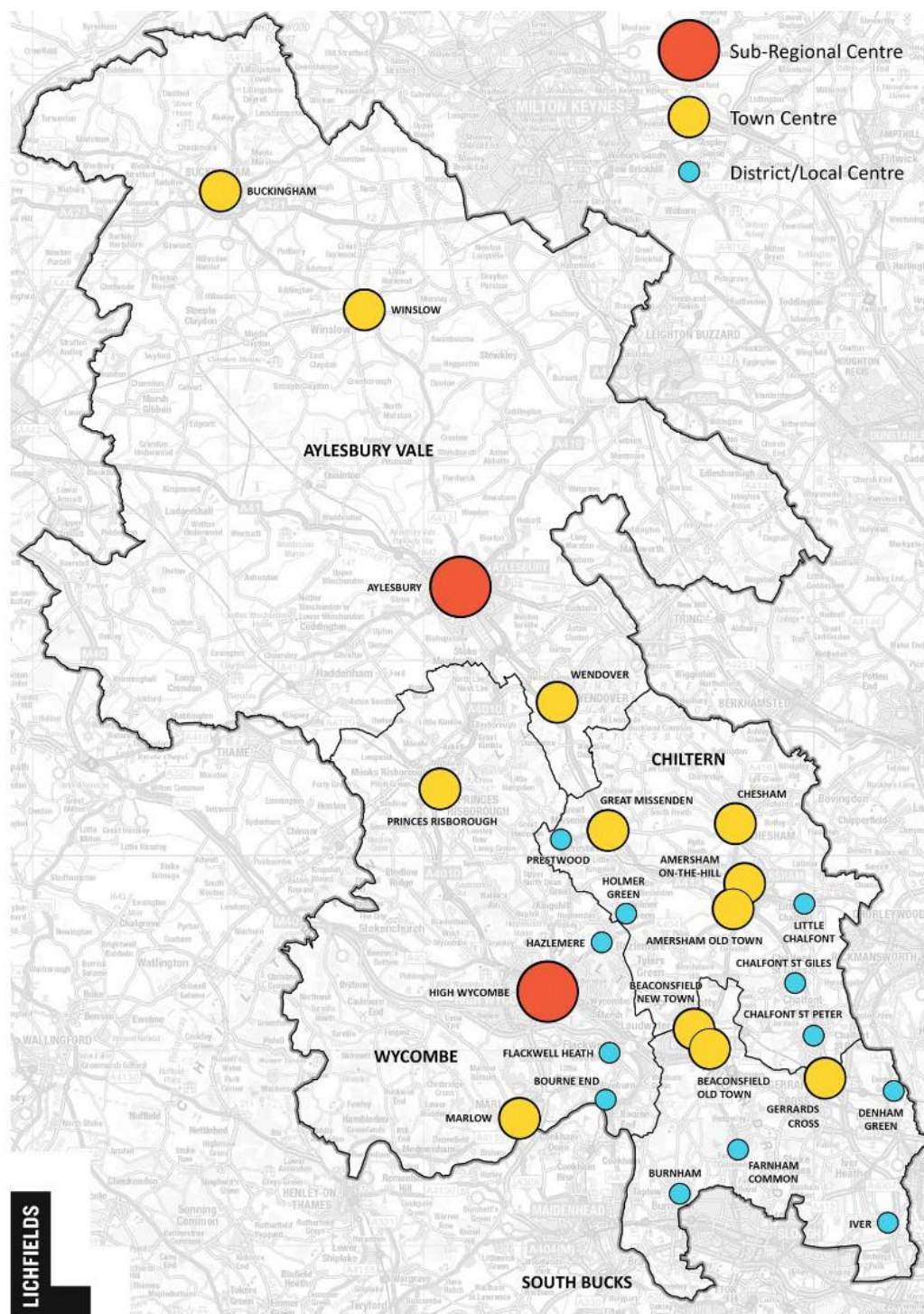
Table 3.1 Designated town, district and local centres in Buckinghamshire

Centre	Previous Local Authority	Development plan designation	Number of units
High Wycombe	Wycombe	Sub-Regional Town Centre	414
Aylesbury	Aylesbury Vale	Town Centre	333
Buckingham	Aylesbury Vale	Town Centre	136
Wendover	Aylesbury Vale	Town Centre	61
Winslow	Aylesbury Vale	Town Centre	56
Marlow	Wycombe	Other Town Centre	206
Princes Risborough	Wycombe	Other Town Centre	103
Chesham	Chiltern	District Centre	168
Amersham on-the-Hill	Chiltern	District Centre	160
Beaconsfield New Town	South Bucks	District Centre	125
Gerrards Cross	South Bucks	District Centre	124
Chalfont St. Peter	Chiltern	District Centre	approx. 80
Burnham	South Bucks	Local Centre	approx. 75
Beaconsfield Old Town	South Bucks	Local Centre	63
Amersham Old Town	Chiltern	Local Centre	59
Great Missenden	Chiltern	Local Centre	52
Bourne End	Wycombe	Local Centre	approx. 50
Little Chalfont	Chiltern	Local Centre	approx. 50
Farnham Common	South Bucks	Local Centre	approx. 35
Flackwell Heath	Wycombe	Local Centre	approx. 35
Chalfont St Giles	Chiltern	Local Centre	approx. 30
Iver	South Bucks	Local Centre	approx. 30
Hazlemere/Tylers Green	Wycombe	Local Centre	approx. 25
Prestwood	Chiltern	Local Centre	approx. 25
Denham Green	South Bucks	Local Centre	approx. 15
Holmer Green	Chiltern	Local Centre	approx. 15

Source: Goad Plans 2022 and Lichfields' land use survey for Great Missenden and Winslow 2023 and previous retail studies.



Figure 3.1 Designated town, district and local centres in Buckinghamshire



3.3

Table 3.1 suggests the categorisation of centres is not consistent across the four previous development plans. For example, the Wycombe Local Plan (2019) identifies Princes Risborough (103 units) as an “Other Town Centre” and smaller centres at Bourne End, Flackwell Heath and Hazlemere/Tylers Green as “District Centres”, whilst the South Bucks Local Plan (1999) only defines Beaconsfield (125 units) and Gerrards Cross (124 units) as “District Centres”.

- 3.4 The 14 designated town centres examined in detail in this study are summarised in Tables 3.2 and 3.3, based on Goad Plan land use data in 2022 and Lichfields' land use survey for Great Missenden and Winslow. These 14 centres were selected by the Council because they are typically main centres with an important local role for convenience shopping and provide other food and drink, leisure and other services.

Table 3.2 Town centres in Buckinghamshire – number of outlets by use

	Total retail units	Comparison goods retail	Convenience goods retail	Food/beverage	Other services*	Vacant units
High Wycombe	<b>414</b>	110	25	90	109	80
Aylesbury	<b>333</b>	81	30	64	103	55
Marlow	<b>206</b>	88	15	41	47	15
Chesham	<b>168</b>	61	13	31	45	18
Amersham on-the-Hill	<b>160</b>	57	14	30	51	8
Buckingham	<b>136</b>	41	9	30	42	14
Beaconsfield New Town	<b>125</b>	49	11	17	37	11
Gerrards Cross	<b>124</b>	34	8	21	40	21
Princes Risborough	<b>103</b>	34	10	16	32	11
Beaconsfield Old Town	<b>63</b>	13	2	18	21	9
Wendover	<b>61</b>	19	6	12	22	2
Amersham Old Town	<b>59</b>	25	3	17	9	5
Winslow	<b>56</b>	16	3	14	19	4
Great Missenden	<b>52</b>	14	4	10	18	6
<b>Total</b>	<b>2,060</b>	<b>642</b>	<b>153</b>	<b>411</b>	<b>595</b>	<b>259</b>
% all units	100.0	31.2	7.4	20.0	28.9	12.6

Source: Goad Plans 2022 and Lichfields' land use survey for Great Missenden and Winslow 2023.

\* excluding Class B, office, D1/D2 and residential uses.

- 3.5 These tables indicate High Wycombe and Aylesbury are by far the largest centres with a wide choice of retail outlets, food/beverage and service uses. In terms of total floorspace, these two centres are more than two times larger than Marlow, the third largest centre.
- 3.6 Other smaller centres vary significantly in size from around 50 units (Great Missenden) to over 200 units (Marlow) or between 3,000 sq.m to 35,000 sq.m in terms of total floorspace.
- 3.7 Beaconsfield Old Town, Wendover, Amersham Old Town, Winslow and Great Missenden are the smallest centres (around 50 to 60 units) and have a more limited range and choice of comparison goods shopping.

Table 3.3 Town centres in Buckinghamshire – floorspace sq.m gross by use

	Total floorspace	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant floorspace
High Wycombe	<b>121,670</b>	57,920	16,230	16,210	14,150	17,160
Aylesbury	<b>77,700</b>	32,380	14,750	10,270	11,050	9,250
Marlow	<b>35,300</b>	13,670	4,410	8,600	6,440	2,180
Chesham	<b>27,700</b>	9,790	6,610	4,140	4,890	2,070
Amersham on-the-Hill	<b>22,620</b>	8,320	3,130	3,970	6,070	1,130
Buckingham	<b>14,770</b>	4,160	2,350	3,290	3,490	1,480
Beaconsfield New Town	<b>29,010</b>	10,810	9,590	3,410	3,410	1,790
Gerrards Cross	<b>21,820</b>	4,610	6,380	3,270	4,070	3,490
Princes Risborough	<b>14,810</b>	3,830	4,290	1,760	2,990	1,940
Beaconsfield Old Town	<b>8,590</b>	2,000	300	3,120	2,330	840
Wendover	<b>6,330</b>	1,880	1,040	1,770	1,400	240
Amersham Old Town	<b>11,494</b>	2,634	5,910	2,287	370	293
Winslow	<b>3,249</b>	845	440	692	986	286
Great Missenden	<b>4,024</b>	685	697	942	1,054	646
<b>Total</b>	<b>398,887</b>	<b>153,354</b>	<b>76,127</b>	<b>63,731</b>	<b>62,700</b>	<b>42,795</b>
% all floorspace	100.0	38.5	19.1	16.0	15.7	10.7

Source: Goad Plans 2022 and Lichfields' land use survey for Great Missenden and Winslow 2023.

\* excluding Class B, office, D1/D2 and residential uses.

### Relative attraction of centres

- 3.8 The Javelin Group's Venuescore ranked over 3,500 retail destinations in the UK in 2017 including town centres, malls, retail warehouse parks and factory outlet centres across the country in 2017. This information has not been updated since 2017, but still provides a useful comparative analysis.
- 3.9 Each destination was given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer was weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The ranks for the shopping destinations within Buckinghamshire and other relevant destination in the sub-region are shown in Table 3.4.
- 3.10 The Venuescore rank usually correlates to the actual market size of the shopping destination in terms of consumer expenditure, but smaller shopping centres tend to have a higher proportion of independent stores that can generate spending levels much higher than their relative Venuescore suggests.
- 3.11 This Javelin information has previously been used in the retail industry to assess the relative strength of shopping destinations. Javelin also assessed the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), also shown in Table 3.4.

Table 3.4 Javelin's Venuescore UK shopping Index rank

Destination	UK Rank 2017	Location grade	Market position
Reading	16 <sup>th</sup>	Major city	Middle
Milton Keynes	34 <sup>th</sup>	Major regional	Upper Middle
Oxford	46 <sup>th</sup>	Major regional	Upper Middle
Watford	47 <sup>th</sup>	Major regional	Middle
High Wycombe	68 <sup>th</sup>	Regional	Middle
Windsor	89 <sup>th</sup>	Regional	Upper Middle
Uxbridge	99 <sup>th</sup>	Regional	Middle
Banbury	121 <sup>st</sup>	Regional	Middle
Slough	146 <sup>th</sup>	Regional	Lower Middle
Aylesbury	166 <sup>th</sup>	Regional	Middle
Bicester Village FO	246 <sup>th</sup>	Sub-regional	Upscale
Maidenhead	265 <sup>th</sup>	Sub-regional	Middle
Henley on Thames	390 <sup>th</sup>	Major district	Middle
Dunstable	438 <sup>th</sup>	Major district	Lower Middle
Bicester	451 <sup>st</sup>	Major district	Middle
Marlow	508 <sup>th</sup>	Major district	Upscale
Leighton Buzzard	592 <sup>nd</sup>	Major district	Middle
Beaconsfield	620 <sup>th</sup>	District	Upper Middle
Chesham	633 <sup>rd</sup>	District	Middle
Bletchley	633 <sup>rd</sup>	District	n/a
Berkhamsted	654 <sup>th</sup>	District	Upper Middle
Amersham on-the-Hill	682 <sup>nd</sup>	District	Middle
Gerrards Cross	754 <sup>th</sup>	District	Upper Middle
Thame	754 <sup>th</sup>	District	Upper Middle
Aylesbury Shopping Park	819 <sup>th</sup>	District	Middle
Aylesbury Broadfields RP	1,044 <sup>th</sup>	Minor district	Middle
Rickmansworth	1,111 <sup>th</sup>	Minor district	Middle
Wallingford	1,325 <sup>th</sup>	Minor district	Middle
Amersham Old Town	1,325 <sup>th</sup>	Minor district	Upscale
Wycombe Retail Park	1,368 <sup>th</sup>	Minor district	Middle
Princes Risborough	1,696 <sup>th</sup>	Local	Middle
Buckingham	2,377 <sup>th</sup>	Local	Upper Middle
Beaconsfield Old Town	2,566 <sup>th</sup>	Local	Upscale
Tring	3,133 <sup>rd</sup>	Local	Middle

Source: Javelin 2017

- 3.12 The market position relates specifically to the fashion offer together with others easily classified operators, because the range and choice of clothing and fashion shopping was the key driver in the relative attraction of large comparison shopping destinations. The Venuescore data was weighted towards clothing and fashion retailing. Clothing/fashion shopping facilities were, and still are, primarily focused within the larger centres.
- 3.13 Consistent with development plan designations within Buckinghamshire, the Javelin index ranked High Wycombe and Aylesbury as the main centres in Buckinghamshire. Most of the other main centres in Buckinghamshire are ranked by Javelin, but Great Missenden and Winslow did not feature in Javelin's rankings due to the absence of comparison goods multiple retailers.
- 3.14 Reading is ranked at the top of the hierarchy in the sub-region as a Major City Centre. Milton Keynes, Oxford and Watford were all ranked within the top 50 in the UK and their

scores reflected the higher number of national multiple retailers present in 2017. High Wycombe was just outside the top 50. The top ranked centres generally had higher market positions, with a focus on luxury and higher value goods rather than discount products. However, several smaller centres were categorised as “Upscale” or “Upper Middle” including Beaconsfield, Buckingham and Amersham Old Town, reflecting the presence of higher end/luxury fashion outlets. However, the luxury fashion sector was affected by Covid, for example Old Amersham has lost Hobbs, Jaegar and Joules. None of the centres in Buckinghamshire were classified as “Lower Middle”, which reflects general levels of affluence across Buckinghamshire.

- 3.15 Overall, the Javelin 2017 analysis suggested the main town centres within Buckinghamshire had a good choice of comparison goods multiple retailers, particularly clothes/fashion shops and their market position reflects the relatively high levels of affluence in Buckinghamshire. However, Reading, Milton Keynes, Oxford and Watford are the dominant comparison goods shopping destinations in the sub-region.
- 3.16 The household survey results also shed light on the position of each centre in the hierarchy. Respondents were asked at which location they buy most of their household’s main food and non-food shopping. Respondents were also asked which of the 14 Buckinghamshire centres they had visited to use shops, services and leisure facilities in the last six months, and the results are shown in Table 3.5.

Table 3.5 Destinations used by households (% of all respondents in the study area)

Destination	Visited in last six months	Main non-food shopping	Main food shopping
High Wycombe	51.9	17.7	21.4
Aylesbury	39.1	10.5	13.2
Marlow	25.4	0.8	1.7
Beaconsfield New Town	21.6	1.5	4.5
Amersham Old Town (incl. Tesco)	20.1	2.0	5.2
Amersham on-the-Hill	18.4	0.3	0.6
Beaconsfield Old Town	15.1	0.0	0.4
Princes Risborough	14.6	0.7	2.2
Chesham	14.4	1.8	3.5
Wendover	14.2	0.1	0.4
Gerrards Cross	13.2	0.8	2.9
Buckingham	10.6	1.4	4.4
Great Missenden	8.6	0.0	0.1
Winslow	6.1	0.0	0.2

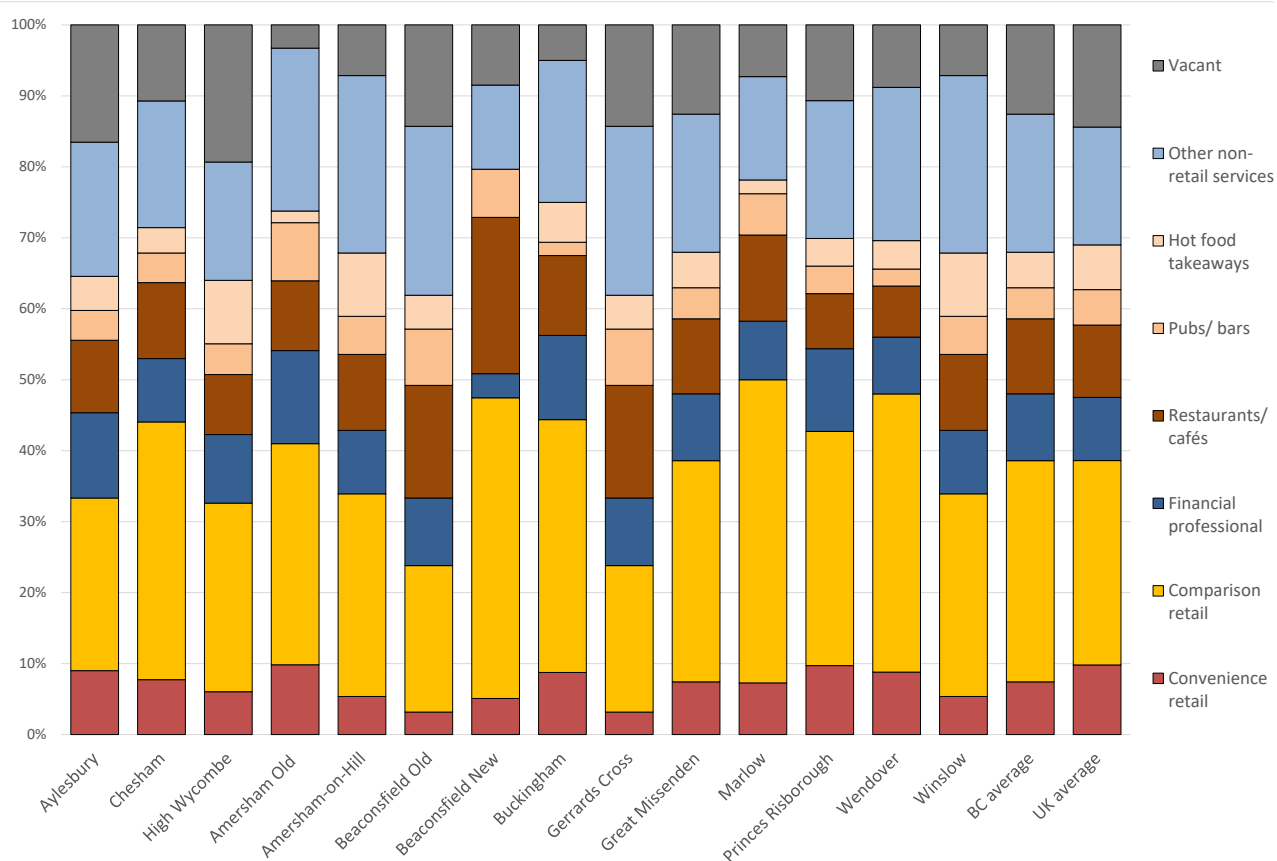
Source: NEMS household survey (February 2023)

- 3.17 High Wycombe and Aylesbury are the only shopping destinations where a reasonable proportion (over 10% of all respondents in the study area) do most of their non-food shopping. These two centres are also the most visited for shops, services and leisure facilities centres, followed by Marlow and Beaconsfield New Town. Great Missenden and Winslow have the lowest proportions of regular visitors, reflecting their size and importance in the wider hierarchy.

### Diversity of main town centre uses

- 3.18 Figure 3.2 below shows the composition of the 14 main town centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the Buckinghamshire and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 6.
- 3.19 Most centres have a reasonable mix of retail and service uses, but Beaconsfield Old Town and Gerrards Cross have a lower proportion of retail uses than the national average. All centres have a relatively high proportion of non-retail services. The food/beverage offer varies significantly, with good restaurant/café provision in Beaconsfield Old Town, Beaconsfield New Town and Gerrards Cross.
- 3.20 Shop unit vacancy rates in Buckinghamshire are generally lower than the current UK average (14.4%), but High Wycombe (19.3%) and Aylesbury (16.5%) have the highest vacancy rates.

Figure 3.2 Mix of retail and service uses (excluding Class B, D1/D2 and residential uses) - % of all units



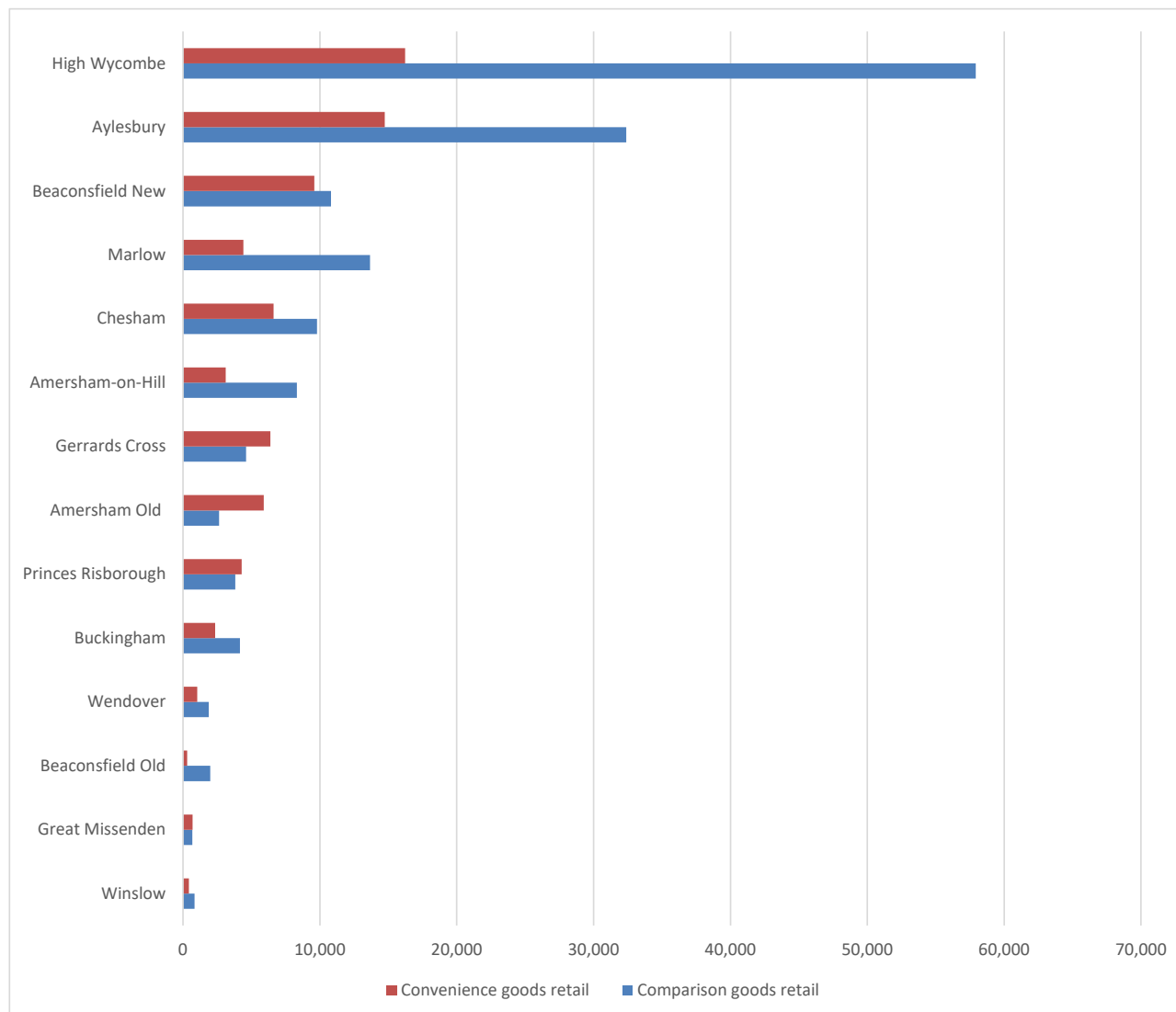
Source: Goad Plan data 2022 and Lichfields' land surveys 2023 for Amersham Old Town, Great Missenden and Winslow.

### Retailer representation

- 3.21 Figure 3.3 compares the proportion of convenience and comparison retail units within each centre. Most of Buckinghamshire's comparison goods retail floorspace is focused in High Wycombe and Aylesbury, where convenience goods retail floorspace is much lower in proportional terms. The smaller centres tend to have a more even balance between

comparison and convenience goods retail floorspace reflecting their localised shopping role. Old Amersham's mix of retail floorspace is distorted by the large Tesco superstore. Beaconsfield New Town and Gerrards Cross also have a strong provision of convenience goods floorspace due to the presence of large food stores.

Figure 3.3 Comparison and convenience goods retail floorspace (sq.m gross)



Source: Goad Plan data 2022 and Lichfields' land surveys 2023 for Amersham Old Town, Great Missenden and Winslow.

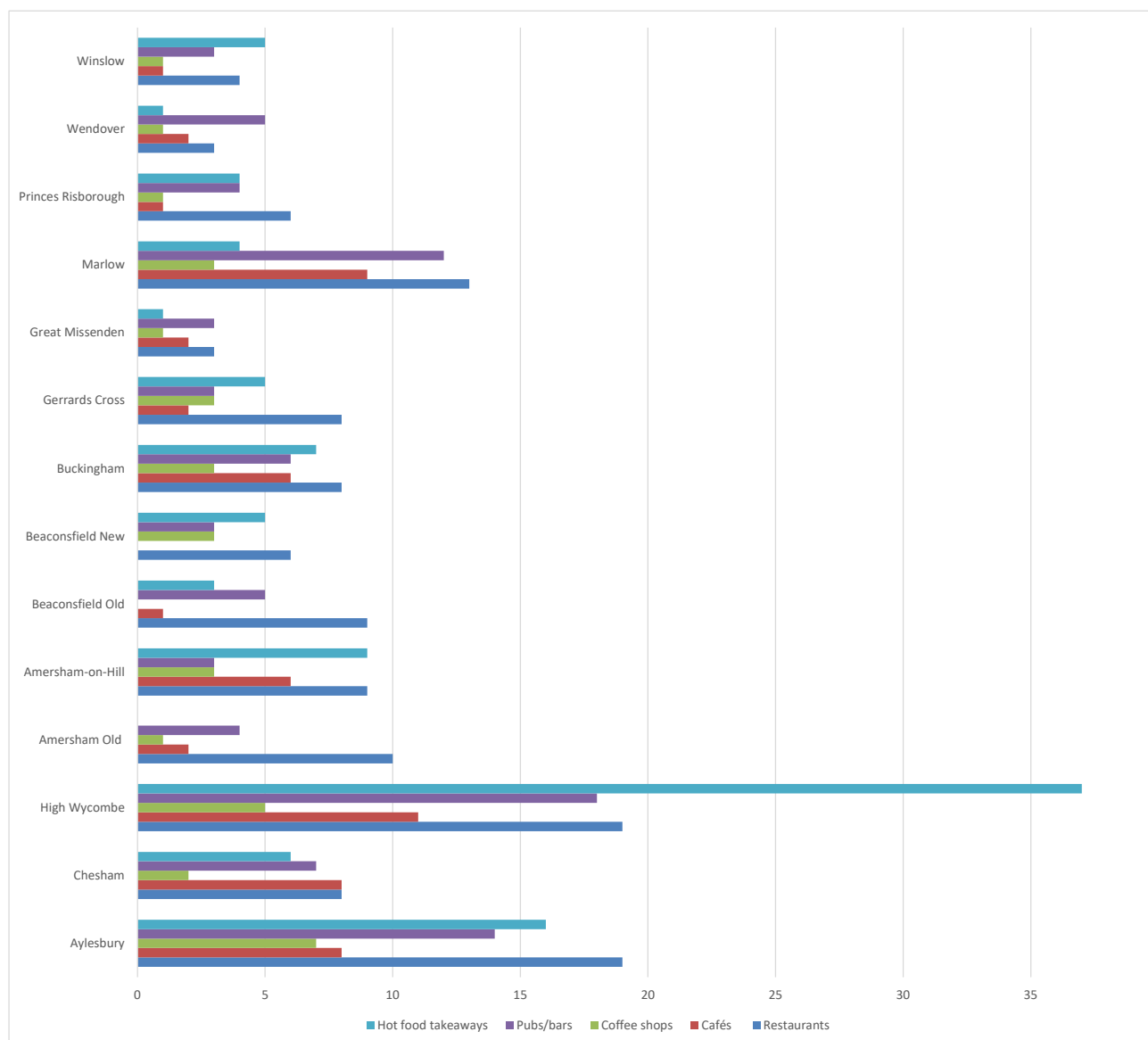
- 3.22 In general, larger centres tend to have a higher proportion of comparison goods shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day-to-day needs of their local catchment area. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs.
- 3.23 A more detailed analysis of the mix of retail uses in each centre is shown in the town centre health checks in the Appendices.

## Service Uses

3.24 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figures 3.4 and 3.5 below summarise the number and proportion of units in different service categories. The service uses are categorised as follows:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways;
- other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

Figure 3.4 Distribution of food/beverage outlets (number of outlets)

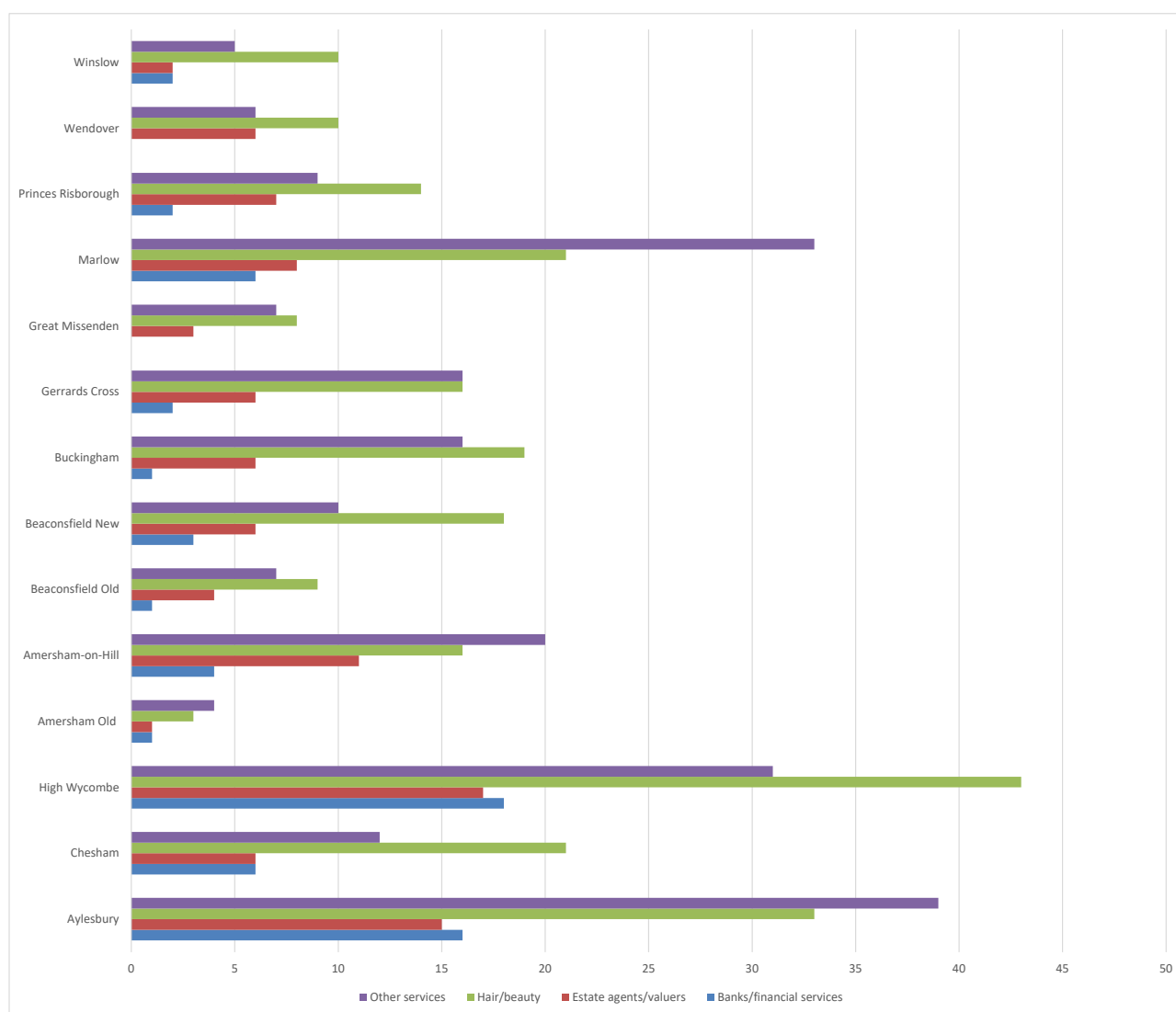


Source: Goad Plan data 2022 and Lichfields' land surveys 2023 for Amersham Old Town, Great Missenden and Winslow



- 3.25 High Wycombe, Aylesbury and Marlow have the highest concentrations of food/beverage outlets. However, most of the other centres have a reasonable choice of facilities.
- 3.26 All centres except Old Amersham have a reasonable range of other non-retail services, particularly hair/beauty salons, as shown in Figure 3.5.
- 3.27 A more detailed analysis of the mix of services uses in each town centre is shown in the centre health checks in the Appendices.

Figure 3.5 Distribution of other non-retail service uses (number of outlets)



Source: Goad Plan data 2022 and Lichfields' land surveys 2023 for Amersham Old Town, Great Missenden and Winslow.

## Summary

- 3.28 The analysis of the hierarchy of centres in this section indicates Buckinghamshire has a well-established network of centres that adequately serve their respective areas. High Wycombe and Aylesbury are the only centres with sub-regional catchment areas, but these centres have the highest shop vacancy rate, above the UK average. The catchment areas of centres overlap to a significant extent, particularly in the south of Buckinghamshire, and

there is a degree of internal competition between centres. The health of the main centres is assessed in more detail in Appendix 6.

3.29 Identifying the hierarchy of centres in future development plans will be important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.

3.30 The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns.

## 4.0 **Retail and food/beverage capacity**

### **Introduction**

- 4.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses within Buckinghamshire. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. 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 and food/beverage (eating and drinking away from the home).

### **Assumptions and base data**

- 4.2 All monetary values expressed in this study are at 2023 prices, consistent with Experian's base year expenditure figures for 2023, which are based on actual recorded expenditure levels rather than projections.

### **Study area zones**

- 4.3 A household telephone survey was undertaken during February 2023. The primary catchment areas of some centres will extend beyond the Buckinghamshire boundary to the southwest and east e.g. the primary catchment area of Aylesbury will extend to the east. The study area is shown in Appendix 1. This study area has been sub-divided into 15 zones based on ward areas to reflect the primary catchment areas of the main centres in Buckinghamshire.
- 4.4 The projected population within each zone between 2024 to 2045 is set out in Table 1 in Appendix 2. The population projections for the zones in the Buckinghamshire area are based on the Local Housing Need as calculated based on the Government's standard method, which is 4,290 dwelling per annum. The population projections assumed a backlog of demand for housing i.e. those people already living in the local area but as part of another household, who want to form their own separate household and live independently). The identified backlog of potential households only represents a proportion of the overall housing need, so there will be additional population growth (above past trends).
- 4.5 The base year 2024 population within the Buckinghamshire study area is 639,449 (Note – the study area extends beyond Buckinghamshire's administrative area). This population is projected to increase to 774,894 by 2045, an increase of +21.18%.

### **Retail expenditure**

- 4.6 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 local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2021 have been obtained.
- 4.7 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 22 – March 2025) has been used to forecast expenditure within the Buckinghamshire

study area. Experian's short-term EBS growth forecast rates during 2024, 2025 and 2026 reflect current economic circumstances, including Covid-19 and the cost-of-living crisis. The forecast changes during this period are as follows:

- convenience goods: -3.2%;
- comparison goods: +0.4%;
- leisure: -1.3%.

4.8 These short-term forecasts reflect the on-going cost-of-living crisis during 2024. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2024, 2025 and 2026. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to recover during 2022. The comparison good retail sector is expected to decline during 2022 and 2023.

4.9 In the longer-term it is more difficult to forecast year-on-year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: -0.3% per annum growth for 2027 to 2031 and -0.2% per annum after 2031;
- comparison goods: +2.5% per annum growth for 2027 to 2031 and +2.6% per annum after 2031; and
- leisure: +0.6% per annum growth for 2027 to 2031 and +0.7% per annum after 2031.

4.10 These growth figures relate to real growth and exclude inflation.

4.11 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2025 are:

- 5.1% of convenience goods expenditure; and
- 23.7% of comparison goods expenditure.

4.12 Experian's projections suggest that these percentages will increase to 7.3% and 29.3% by 2040, respectively.

4.13 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2045, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.

4.14 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the Buckinghamshire study area is forecast to increase by +11.8% from £1,880 million in 2024 to £2,101 million in 2045, as shown in Table 3 (Appendix 2).

4.15 Comparison goods spending is forecast to increase by +84.4% between 2024 and 2045, increasing from £2,273 million in 2024 to £4,193 million in 2045, as shown in Table 3 (Appendix 3).

- 4.16 Food and beverage spending is forecast to increase by +38.1% between 2024 and 2045, increasing from £1,320 million in 2024 to £1,822 million in 2045, as shown in Table 3 (Appendix 4).

### **Growth in turnover densities**

- 4.17 Experian's Retail Planner Briefing Note 22 – March 2025 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -0.6% during 2023 and 2024 but will grow in the short term (+2% per annum during 2025 and 2026) and longer term (+2.3% per annum beyond 2026). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 4.18 For convenience goods retail, Experian indicates a decline of -2.4% during 2023 and 2024 and no growth up to 2031 and then a decline of -0.1% per annum thereafter.
- 4.19 For leisure facilities, including food/beverage floorspace, Experian indicates a -6% decline in sales densities during 2023 and 2024 and then a small average increase of +0.1% per annum thereafter.

### **Base year market shares**

- 4.20 The turnover of facilities within Buckinghamshire is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in February 2023.
- 4.21 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 4.
- 4.22 The household survey results suggest a relatively high level (over 80%) of expenditure retention within the study area for convenience goods shopping as shown in Table 4.1. The retention of comparison goods expenditure is much lower (about 66% in the study area) due to the draw of larger centres outside Buckinghamshire. The retention of food/beverage expenditure is similar to comparison goods shopping at about 69% retention in the study area.
- 4.23 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 2 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.
- 4.24 Buckinghamshire's market shares are much lower in the two zones that lie outside the authority area i.e. Zone 3 (Tring) and Zone 7 (Thame/Chinnor) due to the draw of food stores within these zones. Expenditure leakage from zones within Buckinghamshire is highest (48.1%) from Zone 2 (Buckinghamshire rural northeast) primarily due to outflow to large food stores in Milton Keynes and Leighton Buzzard. Expenditure leakage is also

relatively high from Zone 15 (Denham/Iver) primarily due to outflow to large food stores in Slough and Uxbridge.

Table 4.1 Food and grocery trip retention in the Buckinghamshire study area (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 - Buckingham/Winslow	83.9	73.7	91.8	<b>84.2</b>
2 - Buckinghamshire rural northeast	49.0	51.6	56.9	<b>51.9</b>
3 - Tring	23.3	32.7	14.3	<b>22.4</b>
4 - Aylesbury southeast/Wendover	85.6	84.0	91.3	<b>87.0</b>
5 - Aylesbury urban	98.6	99.5	96.1	<b>98.0</b>
6 - Buckingham rural northwest	59.0	65.0	72.2	<b>64.2</b>
7 - Thame/Chinnor	31.8	21.4	1.5	<b>20.6</b>
8 - Princes Risborough	89.7	86.9	96.9	<b>91.3</b>
9 - Marlow	90.6	93.4	93.0	<b>91.9</b>
10 - High Wycombe west	99.0	96.9	97.7	<b>98.2</b>
11 - High Wycombe east	100.0	99.4	100.0	<b>99.9</b>
12 - Chesham/Great Missenden	87.6	99.4	87.5	<b>86.9</b>
13 - Amersham/Chalfonts	89.9	84.5	90.6	<b>89.1</b>
14 - Beaconsfield/Gerrards Cross	85.2	84.9	86.2	<b>85.5</b>
15 - Denham/Iver	39.9	44.9	70.5	<b>49.1</b>
<b>All</b>	<b>81.2</b>	<b>80.5</b>	<b>83.7</b>	<b>81.8</b>

Source: NEMS household survey results February 2023

4.25

The primary main food and grocery destinations were as follows (% market share of last main food shopping trips within all study area zones):

- 1 Tesco Superstore, London Road West, Amersham (6.3%)
- 2 Asda, Holmers Farm Way, High Wycombe (5.3%)
- 3 Tesco Superstore, London Road, Loudwater, High Wycombe (4.2%)
- 4 Tesco Superstore, Tring Road, Aylesbury (4.1%)
- 5 Tesco Extra, Broadfields Retail Park, Bicester Road, Aylesbury (3.6%)
- 6 Sainsbury's Superstore, Elgiva Lane, Chesham (3.2%)
- 7 Sainsbury's Superstore, Maxwell Road, Beaconsfield (2.9%)
- 8 Tesco Superstore, Packhorse Road, Gerrards Cross (2.9%)
- 9 Sainsbury's Superstore, Oxford Road, High Wycombe (2.8%)
- 10 Tesco Superstore, London Road, Buckingham (2.8%)
- 11 Aldi, Baker Street, High Wycombe (2.7%)
- 12 Waitrose, Penn Road, Beaconsfield (2.4%)
- 13 Waitrose, Greyhound Lane, Thame (2.3%)
- 14 Aldi, Cambridge Street, Aylesbury (2.2%)
- 15 Tesco Superstore, Longwick Road, Princes Risborough (2.2%)
- 16 Morrisons Superstore, Temple End, High Wycombe (2.2%).

4.26 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there is limited potential for Buckinghamshire to increase its market share of convenience goods expenditure in the future, but the potential for further convenience goods retail floorspace could arise in areas of high population growth.

4.27 The market shares for comparison goods shopping in Table 4, Appendix 3 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower, but still reasonably high levels of comparison goods expenditure retention for all goods categories within most study area zones, as shown in Table 4.2.

Table 4.2 Non-food comparison trip retention (% of all trips in study area zones – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighted Market share
1 - Buckingham/Winslow	24.6	24.6	12.5	29.6	35.1	66.4	61.6	41.4	15.4	<b>31.6</b>
2 - Buckinghamshire rural northeast	24.5	51.2	51.4	38.1	33.1	39.1	55.3	41.7	27.2	<b>36.9</b>
3 - Tring	44.2	81.1	61.8	39.4	26.1	28.7	14.1	53.5	31.5	<b>43.7</b>
4 - Aylesbury southeast/Wendover	67.5	90.5	76.5	80.6	81.9	79.4	77.0	80.9	66.8	<b>75.8</b>
5 - Aylesbury urban	70.6	92.9	87.0	67.4	96.3	94.3	96.6	93.8	78.3	<b>82.2</b>
6 - Buckingham rural northwest	39.9	74.3	82.7	65.3	58.6	44.7	49.4	46.1	33.5	<b>52.9</b>
7 - Thame/Chinnor	38.8	59.6	76.6	71.0	50.0	13.8	14.7	38.4	36.3	<b>46.4</b>
8 - Princes Risborough	93.8	96.7	88.9	75.9	90.5	76.6	84.0	92.0	76.9	<b>86.6</b>
9 - Marlow	75.3	87.2	89.1	82.4	85.5	84.6	86.9	93.6	81.4	<b>83.8</b>
10 - High Wycombe west	91.2	97.1	93.4	84.5	96.9	93.3	100.0	92.4	86.5	<b>91.4</b>
11 - High Wycombe east	84.7	90.4	100.0	88.9	98.0	100.0	92.7	91.8	89.8	<b>91.6</b>
12 - Chesham/Great Missenden	62.5	73.7	68.8	47.9	78.4	76.1	84.5	66.5	60.9	<b>65.3</b>
13 - Amersham/Chalfonts	58.8	77.7	75.8	76.4	76.6	83.4	91.1	84.0	58.8	<b>72.6</b>
14 - Beaconsfield/Gerrards Cross	44.1	59.0	70.8	61.4	56.5	56.8	72.7	60.5	59.4	<b>57.6</b>
15 - Denham/Iver	10.6	44.6	28.7	24.8	31.7	27.7	25.7	22.0	26.1	<b>23.2</b>
<b>All</b>	<b>60.1</b>	<b>77.1</b>	<b>75.3</b>	<b>65.8</b>	<b>71.9</b>	<b>70.9</b>	<b>75.5</b>	<b>71.2</b>	<b>58.8</b>	<b>66.1</b>

Source: NEMS household survey results February 2023

4.28 Buckinghamshire's overall market share of comparison goods expenditure is relatively high across all product categories. The lowest market shares are for clothing/footwear (60.1%), furniture/floor-coverings/textiles (65.8%) and other non-food goods, which suggests Buckinghamshire residents are more likely to travel beyond Buckinghamshire to purchase higher order comparison products e.g. clothing shopping trips to Milton Keynes, Bicester Village, Oxford and Central London.

4.29 As with convenience goods shopping, Buckinghamshire's market shares are much lower in the two zones that lie outside Buckinghamshire i.e. Zone 3 (Tring) and Zone 7 (Thame/Chinnor). Expenditure leakage from zones within Buckinghamshire is highest in the north of Buckinghamshire (Zones 1, 2 and 6) primarily due to outflow to Milton Keynes,

Bicester and Oxford. Expenditure leakage is also relatively high from Zone 15 (Denham/Iver) primarily due to outflow to Slough and Uxbridge.

- 4.30 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 4.3.

Table 4.3 Food and beverage trip retention (% of all trips in study area zones)

<b>Zone</b>	<b>Eating out</b>	<b>Drinking away from home</b>	<b>Combined market weighed share</b>
1 - Buckingham/Winslow	68.5	80.1	<b>70.9</b>
2 - Buckinghamshire rural northeast	23.4	38.6	<b>26.5</b>
3 - Tring	19.0	5.1	<b>16.2</b>
4 - Aylesbury southeast/Wendover	69.1	86.6	<b>72.6</b>
5 - Aylesbury urban	84.0	91.9	<b>85.6</b>
6 - Buckingham rural northwest	48.0	56.3	<b>49.7</b>
7 - Thame/Chinnor	23.4	3.0	<b>19.3</b>
8 - Princes Risborough	76.6	80.8	<b>77.5</b>
9 - Marlow	86.6	87.7	<b>86.8</b>
10 - High Wycombe west	75.8	87.0	<b>78.0</b>
11 - High Wycombe east	89.1	90.4	<b>89.3</b>
12 - Chesham/Great Missenden	63.2	82.5	<b>67.0</b>
13 - Amersham/Chalfonts	83.2	79.3	<b>82.4</b>
14 - Beaconsfield/Gerrards Cross	75.3	78.1	<b>75.9</b>
15 - Denham/Iver	49.3	67.8	<b>53.0</b>
<b>All zones</b>	<b>68.7</b>	<b>74.3</b>	<b>69.0</b>

Source: NEMS household survey results February 2023

- 4.31 The survey results suggest reasonable levels of food/beverage expenditure retention across most zones, excluding Zone 3 (Tring) and Zone 7 (Thame/Chinnor) for both eating and drinking. As with shopping trips, leakage is highest from the north and southeast of Buckinghamshire. Retention rates are marginally higher for drinking away from the home than eating out.

## Capacity for convenience goods retail floorspace

- 4.32 Based on the market shares calculated from the February 2023 household survey results, available convenience goods expenditure attracted to Buckinghamshire in 2024 is shown in Table 4 in Appendix 2. This expenditure has been projected forward to 2030, 2035, 2040 and 2045, and is summarised in Tables 11A and 11B in Appendix 2. Convenience goods expenditure available to facilities within Buckinghamshire is expected to increase from £1,500 million in 2024 to £1,691 million in 2045. This increase is due to population growth, which offsets the 7.7% reduction in average expenditure per person (excluding SFT). A breakdown for facilities in each zone is set out in Table 4.4.

- 4.33 The benchmark turnover of food stores and convenience shops within the 14 main centres in Buckinghamshire is calculated in Tables 10A and 10B in Appendix 2. The benchmark



turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

Table 4.4 Convenience goods base year turnover in 2024 (household survey based turnover)

<b>Zone</b>	<b>Turnover £M</b>
1 - Buckingham	78.02
1 - Winslow	14.67
1 – Other Zone 1	0.37
2 - Buckinghamshire rural northeast	7.42
4 – Wendover/other Zone 4	16.05
4/5 - Aylesbury urban	330.97
6 - Buckingham rural northwest	21.67
8 - Princes Risborough/other Zone 8	63.98
9 – Marlow/other Zone 9	78.84
10/11 - High Wycombe/Hazlemere	392.82
12 - Chesham	74.36
12 - Great Missenden/Prestwood	18.38
12 – Other Zone 12	0.87
13 - Amersham/Chalfonts	149.79
14 - Beaconsfield	99.08
14 - Gerrards Cross	57.71
14 – Other Zone 14	42.95
15 - Denham/Iver	19.22
<b>All Buckinghamshire Zones</b>	<b>1,500.09</b>

Source: Tables 10A and 10B in Appendix 2. NB. no figures for Zones 3 and 7, which fall outside Buckinghamshire.

- 4.34 The combined benchmark turnover of identified food stores and other convenience goods shops within the main towns is estimated to be about £1,393 million as shown in Tables 10A, 10B and 10C. Convenience goods shopping facilities within Buckinghamshire appear to be trading healthily.
- 4.35 Tables 11A and 11B in Appendix 2 subtract the projected turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for new development in the future.
- 4.36 By 2030 there is a projected expenditure surplus of £37.91 million, increasing to £84.36 million by 2035 and then to £204.95 million in 2045.
- 4.37 The surplus expenditure projections are converted into floorspace estimates in Table 12 in Appendix 2 based on a combined company average sales density of £12,845 per sq.m net the eight main food store operators. The results are summarised in Table 4.5.
- 4.38 The surplus expenditure projections imply a projected combined under-supply of convenience goods floorspace in Buckinghamshire of 4,380 sq.m gross in 2030 which will increase to 24,071 sq.m gross in 2045, due to population growth.

Table 4.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

<b>Zone</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
1/2 – Buckingham / Winslow / Bucks northeast	301	669	1,082	1,638
4/5/6 Aylesbury /Wendover / Bucks northwest	994	2,260	3,683	5,621
8 - Princes Risborough	160	369	608	933
9 – Marlow	239	531	857	1,296
10/11 - High Wycombe/Hazlemere	1,287	2,859	4,618	6,986
12 – Chesham	227	504	815	1,233
12 – Great Missenden/Prestwood	56	124	200	302
13 - Amersham/Chalfonts	454	1,008	1,628	2,463
14 – Beaconsfield / Gerrards Cross	605	1,345	2,171	3,284
15 – Denham/Iver	58	129	209	316
<b>Total</b>	<b>4,380</b>	<b>9,798</b>	<b>15,869</b>	<b>24,071</b>

Source: Table 12 in Appendix 2. NB. no figures for Zones 3 and 7, which fall outside Buckinghamshire.

### Qualitative need

- 4.39 Convenience goods retail provision in Buckinghamshire is set out in Tables 10A, 10B and 10C in Appendix 2. Convenience goods sales floorspace totals nearly 109,000 sq.m net. Collectively the 14 designated centres in Buckinghamshire have 153 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across Buckinghamshire have good access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates shown in Table 4.1, although the discount food sector is not currently represented in the southeast of Buckinghamshire.
- 4.40 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are 14 food superstores (over 2,500 sq.m net) in Buckinghamshire, as follows:
- Asda, Holmers Farm Way, High Wycombe (6,157 sq.m net);
  - Tesco, London Road, Buckingham (3,332 sq.m net);
  - Morrison's, Station Way, Aylesbury (3,663 sq.m net);
  - Morrison's, Bellfield Road, High Wycombe (3,516 sq.m net)
  - Sainsbury's, Gatehouse Road, Aylesbury (4,546 sq.m net);
  - Sainsbury's, Oxford Road, High Wycombe (6,092 sq.m net);
  - Sainsbury's, Elgiva Lane, Chesham (2,571 sq.m.net);
  - Sainsbury's, Beaconsfield New Town (4,294 sq.m net);
  - Sainsbury's, Lake End Road, Taplow (4,433 sq.m net);
  - Tesco, Tring Road, Aylesbury (5,051 sq.m net);
  - Tesco, Newlands, High Wycombe (5,472 sq.m net);
  - Tesco, London Road, Loudwater (3,174 sq.m net);

- Tesco, Amersham Old Town (4,807 sqm net); and
- Tesco, Bath Road, Taplow (3,411 sq.m net).

4.41 Other food superstores in Milton Keynes, Maidenhead and Slough are also reasonably accessible for some residents in Buckinghamshire.

4.42 In addition to these food superstores, there is good choice of other large stores/supermarkets and smaller convenience stores in Buckinghamshire. The discount food sector is well represented with six Aldi stores and six Lidl stores, with a further Lidl store proposed in Aylesbury and Aldi proposed in Amersham Old Town. However, as mentioned above, the discount food sector is not currently represented in the southeast of Buckinghamshire i.e. Beaconsfield, Chesham and Gerrards Cross.

4.43 Household survey respondents who had visited centres in Buckinghamshire in the last six months, were asked what they like about town centres and what improvement would make them visit more often. The results indicate similar levels of satisfaction and dissatisfaction with supermarket provision in the town centres (4% and 3.2% respectively). The highest levels of supermarket satisfaction were recorded in Gerrards Cross and Beaconsfield New Town. The highest levels of dissatisfaction were recorded in Winslow and Buckingham, despite the presence of Tesco, Aldi, Lidl and Waitrose in the latter.

4.44 The household survey results indicated a higher level of dissatisfaction with the provision of other small foods shops (e.g. bakers/butchers/greengrocers), particularly in Buckingham, Great Missenden, Beaconsfield Old and New Town. However, as indicated in Section 3, all centres have a reasonable proportion of convenience goods retail uses. There are no obvious areas of deficiency in food store or convenience goods provision in Buckinghamshire.

## **Capacity for comparison goods floorspace**

4.45 Available comparison goods expenditure has been projected to 2030, 2035, 2040 and 2045 and is summarised in Table 11 in Appendix 3. Comparison goods expenditure available to facilities in Buckinghamshire is expected to increase from £1,500 million in 2024 to £2,778 million by 2045.

4.46 Table 11 in Appendix 3 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

4.47 By 2030 there is a projected expenditure surplus of £53.73 million, increasing to £126.98 million by 2035 and then to £420 million.

4.48 The projections suggest growth in turnover densities will partially absorb expenditure growth but there is likely to be an under-supply of comparison goods retail floorspace in the

future. The expenditure projections have been converted into floorspace estimates Table 11 in Appendix 3. The results are summarised in Table 4.6.

Table 4.6 Comparison goods floorspace capacity (sq.m gross) - cumulative

<b>Zone</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
1/2 – Buckingham / Winslow / Bucks northeast	207	433	682	1,127
4/5/6 Aylesbury /Wendover / Bucks northwest	2,563	5,513	8,788	14,908
8 - Princes Risborough	170	360	570	954
9 – Marlow	363	759	1,195	1,975
10/11 - High Wycombe/Hazlemere	4,987	10,456	16,486	27,331
12 – Chesham	369	769	1,210	1,998
12 – Great Missenden/Prestwood	50	104	164	270
13 - Amersham/Chalfonts	510	1,063	1,672	2,759
14 – Beaconsfield / Gerrards Cross	412	859	1,351	2,230
15 – Denham/Iver	141	294	462	762
<b>Total</b>	<b>9,772</b>	<b>20,612</b>	<b>32,580</b>	<b>54,315</b>

Source: Table 12 in Appendix 3. Note: no figures for Zones 3 and 7, which fall outside Buckinghamshire.

- 4.49 The surplus expenditure projections imply a combined under-supply of comparison goods floorspace in Buckinghamshire of 9,772 sq.m gross in 2030 increasing to 20,612 sq.m gross in 2035 and then to 54,315 sq.m gross in 2045.

### Qualitative need

- 4.50 Comparison goods retail provision in Buckinghamshire is set out in Table 10 in Appendix 3. Comparison goods sales floorspace totals over 214,000 sq.m net. Collectively the 14 designated centres in Buckinghamshire have 642 comparison goods outlets with a total sales area of about 110,000 sq.m net. Aylesbury and High Wycombe have a good provision of large out of centre comparison goods stores including John Lewis at High Wycombe. Out of centre comparison stores and retail warehouse parks provide a further sales area of over 81,000 sq.m net. Comparison goods sales floorspace within out-of-centre large food store totals over 22,000 sq.m net.
- 4.51 As indicated in Section 3, most centres have a reasonable proportion of comparison good retail uses and the retention of comparison goods expenditure in the central study area zones is relatively high (over 80%). The analysis of centres in Appendix 6 indicates the range and choice of comparison goods shops varies from centre to centre. Most categories of comparison goods shops are available in Aylesbury and High Wycombe and the choice of outlets within each category is good. The range of comparison goods shops is also reasonable in Amersham on-the-Hill, Chesham, Beaconsfield New Town and Marlow, but the choice of shops in some categories is more limited than in Aylesbury and High Wycombe. The range and choice of comparison shops in the other smaller centres varies but is generally limited with some categories not represented and the choice of shops within each category is small.
- 4.52 Buckingham and Winslow in the north of Buckinghamshire offer a relatively limited range and choice of comparison goods shops but residents in the catchment areas of these two centres have good access to extensive facilities in Milton Keynes and Bicester. Residents in Burnham/Taplow and Denham/Iver areas have good access to facilities in Maidenhead, Slough, Uxbridge and Windsor.

- 4.53 The household survey results indicate similar levels of satisfaction and dissatisfaction with non-food shops in general provision in the town centres (5.4% and 4.3% respectively). The highest levels of non-food shop satisfaction were recorded in Amersham on the Hill, Amersham Old Town and Marlow. The highest levels of dissatisfaction were recorded in Buckingham, Great Missenden and Aylesbury.
- 4.54 Levels of satisfaction were higher (+3.7% net) for the range of independent/specialist shop, but there were higher levels of dissatisfaction (-5.1%) for clothing shops, the range of high street multiples (-2.2% net) and affordability of shops (-3.3%).
- 4.55 Overall, the accessibility for residents in Buckinghamshire to a range and choice of comparison goods shopping destinations is good due to the distribution of town centres within and surrounding Buckinghamshire and many retail parks and large out of centre stores.

## Capacity for food/beverage floorspace

- 4.56 Available food and beverage expenditure has been projected forward to 2030, 2035, 2040 and 2045, and is summarised in Table 10 in Appendix 4. The amount of expenditure attracted to Buckinghamshire is expected to increase from £902 million in 2024 to £1,313 million in 2045.
- 4.57 Table 11 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2030 there is an expenditure surplus of £78.84 million. Continued population and expenditure growth creates an expenditure surplus of £154.68 million in 2035 increasing to £393.47 million by 2045. Floorspace capacity projections are shown in Table 12 in Appendix 4 and summarised in Table 4.7 below.

Table 4.7 Food / beverage floorspace capacity (sq.m gross) - cumulative

Zone	2030	2035	2040	2045
1/2 – Buckingham / Winslow / Bucks northeast	558	1,090	1,683	2,347
4/5/6 Aylesbury /Wendover / Bucks northwest	2,040	3,986	6,162	8,590
8 - Princes Risborough	295	577	892	1,244
9 – Marlow	1,276	2,489	3,846	5,363
10/11 - High Wycombe/Hazlemere	1,299	2,535	3,917	5,462
12 – Chesham	351	686	1,060	1,477
12 – Great Missenden/Prestwood	155	302	467	651
13 - Amersham/Chalfonts	1,200	2,342	3,619	5,047
14 – Beaconsfield / Gerrards Cross	1,388	2,708	4,184	5,834
15 – Denham/Iver	163	317	490	683
<b>Total</b>	<b>8,725</b>	<b>17,033</b>	<b>26,321</b>	<b>36,700</b>

Source: Table 12 in Appendix 4. Note: no figures for Zones 3 and 7, which fall outside Buckinghamshire.

## Qualitative need

- 4.58 Food/beverage provision in Buckinghamshire is set out in Table 9 in Appendix 4. Collectively the 14 designated centres have 125 restaurants, 59 cafés, 34 coffee shops, 90

pubs/bars and 103 hot food takeaways. These centres within Buckinghamshire provide a good range and choice of food and beverage facilities.

4.59 The household survey results indicate higher levels of satisfaction than dissatisfaction with the provision of cafés/restaurants in the town centres (16.2% compared with 5.2% or +11% net). The highest levels of satisfaction were recorded in Beaconsfield Old Town, Amersham Old Town, Marlow and Wendover. The lowest levels of satisfaction were recorded in High Wycombe, Great Missenden and Princes Risborough, although views in these centres were mixed.

4.60 The household survey results indicate mixed views regarding pub/bar provision, with similar levels of satisfaction and dissatisfaction. The highest levels of satisfaction were recorded in Beaconsfield Old Town, Amersham Old Town and Marlow. The highest levels of dissatisfaction were recorded in Great Missenden, Buckingham and Gerrards Cross. Views were generally mixed in other centres.

## Operator space requirements

4.61 The Requirements List publishes potential space requirements for multiple retail and food/beverage operators. The current (April 2025) list of operators who's published information suggest they may have space requirements in Buckinghamshire is as follows.

### Aylesbury

• Lidl	supermarket	18,000 to 26,000 sq.ft
• British Heart Foundation	charity shop	1,500 to 14,000 sq.ft
• Blue Cross	charity shop	500 sq.ft
• Evapo	vape shop	350 to 1,000 sq.ft
• Deichmann	shoe and sportswear retailer	4,000 to 6,000 sq.ft
• Consol	tanning studio	1,250 to 3,500 sq.ft
• Age UK	charity shop	1,400 to 5,000 sq.ft
• Salvation Army	charity shop	3,500 to 15,000 sq.ft
• Sense	charity shop	1,200 to 6,000 sq.ft
• Poundstretcher	retail value store	6,000 to 30,000 sq.ft
• Calendar Club	calendar retailer	800 to 2,000 sq.ft

### High Wycombe

• Lidl	supermarket	18,000 to 26,000 sq.ft
• Shah's Halal Food	restaurant/takeaway	500 to 1,000 sq.ft
• KFC	fast food	1,200 to 2,500 sq.ft
• Bensons	bed retailer	4,000 to 8,000 sq.ft
• BRIM Burgers	restaurant/takeaway	500 to 2,000 sq.ft
• Character.com	Fancy dress clothing	2,500 to 4,000 sq.ft
• Consol	tanning studio	1,250 to 3,500 sq.ft
• Sunshine Co	tanning studio	1,000 to 2,000 sq.ft
• Salvation Army	charity shop	3,500 to 15,000 sq.ft
• Helen & Douglas	charity shop	1,200 to 4,000 sq.ft
• Loaf	sofas, beds and furniture	5,000 to 10,000 sq.ft
• The Range	home, garden and leisure	25,000 to 80,000 sq.ft
• McMullen & Sons	pub	2,500 to 5,000 sq.ft
• Sense	charity shop	1,200 to 6,000 sq.ft
• Giant Bicycles	bicycles	2,000 to 6,000 sq.ft

### Chesham

• Lidl	supermarket	18,000 to 26,000 sq.ft
• Loaf	sofas, beds and furniture	5,000 to 10,000 sq.ft
• Grape Tree	health food store	800 to 1,800 sq.ft
• Aldi	supermarket	18,000 to 20,000 sq.ft
• McMullen & Sons	pub	2,500 to 5,000 sq.ft
• Sense	charity shop	1,200 to 6,000 sq.ft

**Amersham**

• Lidl	supermarket	18,000 to 26,000 sq.ft
• Heal's	furniture	3,000 to 4,000 sq.ft
• Magnet	kitchens	1,600 to 3,000 sq.ft
• Blue Cross	charity shop	500 sq.ft
• House of Tweed	Luxury fashion	1,000 to 4,000 sq.ft
• KFC	fast food	1,200 to 2,500 sq.ft
• Grape Tree	health food store	800 to 1,800 sq.ft
• McMullen & Sons	pub	2,500 to 5,000 sq.ft
• dim t	Asian food restaurant	3,000 to 4,500 sq.ft
• Giant Bicycles	bicycles	2,000 to 6,000 sq.ft
• M&S Food	supermarket	6,000 to 25,000 sq.ft

**Beaconsfield**

• Lidl	supermarket	18,000 to 26,000 sq.ft
• Blue Cross	charity shop	500 sq.ft
• Hobbs	women's clothing	2,500 to 3,000 sq.ft
• Savers	health/beauty retailer	2,000 to 3,000 sq.ft
• Grape Tree	health food store	800 to 1,800 sq.ft
• Megan's	Mediterranean restaurant	2,200 - 5,000 sq.ft
• Vinegar Hill	home, fashion & lifestyle products	1,000 to 2,000 sq.ft
• Cofi Lab	coffee shop	1,500 to 1,750 sq.ft
• McMullen & Sons	pub	2,500 to 5,000 sq.ft
• dim t	Asian food restaurant	3,000 to 4,500 sq.ft
• Sense	charity shop	1,200 to 6,000 sq.ft
• Giant Bicycles	bicycles	2,000 to 6,000 sq.ft
• M&S Food	supermarket	6,000 to 25,000 sq.ft

**Buckingham**

• KFC	fast food	1,000 to 2,500 sq.ft
• Savers	health/beauty retailer	2,000 to 3,000 sq.ft
• Majestic Wine	wine merchant	2,500 to 5,000 sq.ft
• Cook	frozen meals	900 to 1,400 sq.ft
• McMullen & Sons	pub	2,500 to 5,000 sq.ft
• dim t	Asian food restaurant	3,000 to 4,500 sq.ft
• Papa Johns	pizza delivery and takeaway	1,000 sq.ft
• Tesco	convenience store	3,000 to 5,000 sq.ft
• Caprinos Pizza	pizza restaurant	850 to 1,200 sq.ft

**Gerrards Cross**

• Lidl	supermarket	18,000 to 26,000 sq.ft
• Blue Cross	charity shop	500 sq.ft

**Marlow**

• Anthropologie	women's clothing & homeware	3,000 to 8,000 sq.ft
• Heal's	furniture	3,000 to 4,000 sq.ft
• Naturalmat	Beds	2,500 to 4,000 sq.ft
• Magnet	kitchens	1,600 to 3,000 sq.ft
• Daniella Draper	Jewellery	500 to 800 sq.ft
• Blue Cross	charity shop	500 sq.ft
• Rod & Gunn	Menswear	1,00 to 2,500 sq.ft
• Cofi Lab	coffee shop	1,500 to 1,750 sq.ft
• Handi	phone and computer repair	800 to 1,500 sq.ft
• Tapi	carpets	2,000 to 4,000 sq.ft
• Baldwins Travel	travel agents	850 to 1,200 sq.ft
• Grape Tree	health food store	800 to 1,800 sq.ft
• Majestic Wine	wine specialist	2,500 to 5,000 sq.ft
• Between The Lines	gift retailer	850 to 1,800 sq.ft
• Vinegar Hill	home, fashion & lifestyle products	1,000 to 2,000 sq.ft
• McMullen & Sons	pub	2,500 to 5,000 sq.ft
• dim t	Asian food restaurant	3,000 to 4,500 sq.ft
• Sense	charity shop	1,200 to 6,000 sq.ft
• M&S Food	supermarket	6,000 to 25,000 sq.ft

**Princes Risborough**

• Cook	frozen meals	900 to 1,400 sq.ft
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- M&S Food supermarket 6,000 to 25,000 sq.ft

4.62 In total there are 47 operators listed as having potential space requirements in Buckinghamshire with a potential total floorspace requirement of at least 13,700 sq.m gross (147,000 sq.ft), as follows:

- Convenience goods retailers 7 (about 4,500 sq.m gross)
- Comparison goods retailers 27 (about 7,400 sq.m gross)
- Food/beverage operators 9 (about 1,400 sq.m gross)
- Other service uses 7 (about 400 sq.m gross)

4.63 Some operators have space requirements listed for more than one town in Buckinghamshire, which suggests their requirement may relate to a general area of search rather than a specific town. Furthermore, some of these listed requirements are likely to be generic interest in centres of a similar size across the southeast region rather than specifically in Buckinghamshire. Some of the requirements could relate to the need for existing premises to be expanded. Other requirements may have already been accommodated but, as yet, not removed from the published list. Bearing these caveats in mind, the total number of requirements and amount of floorspace outlined above should be treated with caution.

4.64 There appears to be strong interest from the discount food sector. Some of this interest may have been met by recent developments and planning applications e.g. in Aylesbury and High Wycombe. Aldi and Lidl have interest in the southeast of Buckinghamshire.

4.65 There is also reasonable interest from the food/beverage sector across most centres. However, interest from multiple comparison goods retail operators, including charity shops, is focused primarily in Marlow (10), High Wycombe (8 listed requirements), Aylesbury (9) and Beaconsfield (5).



## 5.0 **Leisure and other town centre uses**

### **Introduction**

- 5.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study. The demand for office uses (now included in the new Use Class E) needs to be assessed in the context of the wider need for Class B employment uses, as part of the separate employment land review.
- 5.2 Residents in Buckinghamshire have a relatively good range of commercial leisure and entertainment uses within the authority area and within neighbouring settlements including Milton Keynes, Maidenhead and Slough. Rail access to facilities within Central London also provides additional opportunities for leisure, entertainment and cultural trips.

### **Leisure, entertainment and cultural expenditure**

- 5.3 Experian's projections and local expenditure data for the Buckinghamshire study area indicates the resident population generates £336.46 million in 2024 (an average of about £526 person) on selected cultural, recreational and sporting services, including:
- cinema admissions;
  - live entertainment i.e. theatre/concerts/shows;
  - museums, theme parks, houses and gardens;
  - admissions to clubs, dances, discos, bingo;
  - other miscellaneous entertainment;
  - subscriptions for leisure activities; and
  - leisure class fees.
- 5.4 Leisure, entertainment and cultural expenditure per capita within each study area zone is shown in Table 2 in Appendix 5. Expenditure is projected to 2030, 2035, 2040 and 2045 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 22 – March 2025). Taking population growth into account leisure expenditure is projected to increase by 16.9% from £336.46 million in 2024 to £465.15 million in 2045.
- 5.5 Not all leisure/cultural spend from study area residents will be spent in Buckinghamshire. The household survey results have been used to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 5.1. Less than 7% of households do not participate in any of the nine leisure activities explored by the household survey.
- 5.6 The participation and retention rates vary significantly for each activity. Many residents travel outside the study area e.g. to London, Milton Keynes and Oxford for some leisure

activities. The retention rate is highest for trips to health/fitness but much lower for museums/art galleries and nightclubs/live music venues. These results suggest Buckinghamshire residents are prepared to travel further for museum/art gallery and nightclub/live music venue activities. Facilities in London attract a high proportion of museum/art gallery (57%) and nightclub/live music venue trips (47%).

Table 5.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% households participating	% trips attracted to Buckinghamshire
Cinema	55.7	66.0
Theatre	48.7	49.1
Nightclubs / live music venues	16.0	30.5
Bingo	4.7	58.5
Gyms / health and fitness club	28.6	79.2
Tenpin bowling / gaming	20.1	69.8
Trampoline parks	13.9	71.6
Museums / art galleries	35.7	17.2

Source: NEMS household survey results February 2023

- 5.7 The household survey results and Experian's expenditure figures have been used to estimate combined leisure, entertainment and cultural expenditure market shares within each study area zones. These market shares or penetration rates are shown in Table 4 in Appendix 5.
- 5.8 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, the analysis suggests Buckinghamshire currently retains about 57% of resident's total leisure expenditure within the study area, £191.37 million of the £336.46 million total, as shown in Table 5 in Appendix 5.
- 5.9 London attracts about 19% of study area residents expenditure, primarily from the zones in the southeast of the study area. Milton Keynes/Bletchley attracts over 4% of expenditure primarily from the northern half of Buckinghamshire and Oxford attracts 3% of expenditure primarily from the western zones.

## Leisure, entertainment and cultural floorspace capacity

- 5.10 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +6.3% between 2024 to 2035 and by +13.9% between 2024 to 2045. With population growth leisure/cultural expenditure should increase from £336.46 million in 2024 to £395.65 million by 2035, an additional £59.19 million. The longer-term increase to 2045 is an additional £128.69 million.
- 5.11 The household survey results suggest the development strategy for Buckinghamshire should aim to retain about 57% of this expenditure growth. If Buckinghamshire can retain its current market share of leisure expenditure across the study area zones then the amount of retained expenditure will increase from £191.37 million in 2024 to £225.75 million in 2035, and then to £244.79 million in 2040 and £266.11 million in 2045, as shown in Tables 5 to 9 in Appendix 5 and summarised in Table 10.

- 5.12 Table 10 in Appendix 5 subtracts the turnover of existing leisure, entertainment facilities including an allowance for growth in turnover densities. Experian projections (Retail Planner Briefing Note 22 – Leisure) suggest the sales density of leisure floorspace will decrease by -0.1% during 2025 but will recover to +0.1% per annum after 2025. Based on these growth rates the leisure turnover of existing facilities should increase from £191.37 million in 2024 to £195.04 million by 2045.
- 5.13 In 2030 there is a projected small expenditure surplus of £16.64 million, which will increase to £32.65 million in 2035 and then to £71.07 million in 2045. The surplus leisure expenditure projections have been converted into floorspace estimates Table 11 in Appendix 5. The results are summarised in Table 4.6. Based on Lichfields experience, leisure floorspace normally trades on average around £2,750 per sq.m gross.

Table 5.2 Leisure, entertainment and cultural floorspace capacity (sq.m gross) - cumulative

<b>Zone/Area</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
1/2 – Buckingham / Winslow / Bucks northeast	242	473	730	1,018
4/5/6 Aylesbury / Wendover / Bucks northwest	1,601	3,130	4,840	6,746
8 - Princes Risborough	215	420	648	904
9 – Marlow	689	1,344	2,076	2,894
10/11 - High Wycombe/Hazlemere	2,008	3,919	6,057	8,446
12 – Chesham	442	863	1,334	1,860
12 – Great Missenden/Prestwood	445	867	1,340	1,869
13 - Amersham/Chalfonts	336	655	1,013	1,412
14 – Beaconsfield / Gerrards Cross	49	96	148	207
15 – Denham/Iver	242	473	730	1,018
<b>Total</b>	<b>6,026</b>	<b>11,767</b>	<b>18,186</b>	<b>25,356</b>

Source: Table 11, Appendix 5. NB. no figures for Zones 3 and 7, which fall outside Buckinghamshire.

- 5.14 The leisure/entertainment/cultural floorspace projection to 2045 for Buckinghamshire is 25,356 sq.m gross. This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

## Cinemas

- 5.15 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2024 figures indicate 126.5 million cinema trips were made in the UK, still 28% below pre-Covid levels (176 million). The cinema assessment for Buckinghamshire assumes trip levels comparable with the latest UK average levels, i.e. an average of 1.8 trips per person per annum.
- 5.16 The UK Film Distributor' Association identifies 977 cinema facilities with 4,578 screens and 790,000 seats in the UK in 2023. Lichfields' national CINESCOPE model assesses the

provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen or 220 trips per annum for each seat available.

- 5.17 The population of the Buckinghamshire study area is 639,449, which based on the latest 2024 national average above, would generate 1.15 million cinema trips, which could theoretically support about 30 cinema screens or 4,650 cinema seats. However, not all cinema trips will be retained within Buckinghamshire, therefore the theoretical capacity will be lower than 30 screens. The larger centres surrounding Buckinghamshire e.g. Oxford and Milton Keynes mean it is likely that more cinema trips are made leaving Buckinghamshire than are made entering it. Therefore, the theoretical capacity will be lower than 30 screens.
- 5.18 Based on the current cinema market share for Buckinghamshire (66%) suggested by the household survey results, 20 screens or 3,070 cinema seats could be supported based on the UK latest average visitation rate (1.8 trips per person).
- 5.19 Buckinghamshire has five full-time cinemas with 29 screens and 5,614 seats, as follows:
- Odeon Luxe, Aylesbury - 6 screens (623 seats)
  - Everyman, Gerrards Cross - 2 screens (478 seats)
  - Cineworld, High Wycombe - 12 screens (2,562 seats)
  - Empire, High Wycombe - 8 screens (1,836 seats)
  - Pinewood Cinema, Iver Heath - 1 screen (115 seats)
- 5.20 A new Everyman cinema (2 screens with 156 seats) opened in Marlow in September 2023. In addition to these full-time cinemas, there are part time cinema screenings at the Elgiva Theatre (300 seats) in Chesham and The Film Place in Buckingham. This supply and the base year trip estimates suggest there is a reasonable balance between supply (screen/seats) and demand (trips). Cinema provision surrounding Buckinghamshire offers significant choice. The main multiplex facilities (totalling 125 screens) are:
- Cineworld Hemel Hempstead - 17 screens
  - Cineworld Luton - 11 screens
  - Cineworld, Milton Keynes - 16 screens
  - Cineworld, Watford - 9 screens
  - Curzon, Oxford - 5 screens
  - Odeon Luxe, Maidenhead - 10 screens
  - Odeon, Oxford - 6 screens
  - Odeon, Milton Keynes - 16 screens
  - Odeon, Uxbridge - 5 screens
  - Vue Bicester - 7 screens
  - Vue, Oxford - 12 screens

- Vue, Watford - 11 screens

5.21 Population within the Buckinghamshire study area is projected to increase from 633,881 to 774,894 by 2045. Population in 2045 could generate 1.39 million cinema trips based on the latest UK average visitation rate. If Buckinghamshire continues to attract 66% of all cinema trips (920,600 trips) then the theoretical capacity in Buckinghamshire for 24 screens and 4,185 seats. These projections plus the new Everyman cinema in Marlow suggest limited capacity to support further cinema facilities up to 2045. Existing cinema provision in Milton Keynes, Hemel Hempstead and other surrounding settlements may limit operator demand for a new facility within the study area.

## **Theatres, nightclubs, live music and other cultural activities**

5.22 The household survey results indicate a relatively high proportion (nearly 49%) of respondents in the study area visit theatres. About 36% visit museums/art galleries. Only 16% visit nightclubs/live music venues.

5.23 The Theatre Trust estimates there are over 1,100 active theatres in the UK, which is on average around one venue per 62,000 people. Experian expenditure data suggests £3.5 billion was spent by UK residents on live entertainment (i.e. theatres, concerts and shows) in 2023, which is about £52 per person. Total live entertainment expenditure was around £3.2 million per theatre venue in the UK in 2023, based on the theatre Trusts estimate (1,100 venues).

5.24 Experian's local expenditure data indicates the Buckinghamshire study area generated £65.97 million on live theatre, concerts and shows in 2024, which is projected to increase to £77.6 million in 2035 and £91.2 million in 2045. Based on the average ticket revenue per venue (£3.2 million) the Buckinghamshire study area population currently generates theoretical demand for about 20 venues. This theoretical demand could increase to 28 venues in 2045. If Buckinghamshire retained about half of future theatre trips generated by residents in the study area (based on the current market share) then there is theoretical demand for 4 new venues by 2045.

5.25 The main theatre venues in Buckinghamshire specifically mentioned by respondents in the household survey were as follows:

- Aylesbury Waterside Theatre, Aylesbury (25.0% of participating households);
- Wycombe Swan, High Wycombe (11.9%);
- The Elgiva Theatre, Chesham (2.9%);
- The Young Theatre, Beaconsfield (0.6%); and
- Theatre on the Hill, Amersham (0.2%).

5.26 Other theatre venues in Buckinghamshire, not mentioned in the household survey responses, are Queens Park Arts Centre and the Unbound Theatre in Aylesbury. Buckinghamshire's existing provision (seven venues) is above the theoretical demand generated by the study area, based on the current market share (48.7%). Based on the existing number and distribution of venues there could be potential for additional venues in Buckinghamshire.

- 5.27 The nightclub/live music sector (not including music halls) has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 5.28 The household survey results suggest only 16% of households visit nightclubs/music venues and of these participating households only 30.5% of trips generated by the study area are retained within Buckinghamshire. Nearly 47% of participating households are attracted to facilities in London and about 8% are attracted to Milton Keynes. This is a national trend that reflects the UK's aging population.
- 5.29 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc was £22.8 million within the Buckinghamshire study area in 2024. Expenditure retained in Buckinghamshire is around £6.8 million, which is projected to increase to about £9.4 million in 2045. This small increase in retained expenditure (+£2.6 million) and access to nightclub/live music venues in London and Milton Keynes are likely to limit demand for additional facilities in Buckinghamshire.
- 5.30 Experian's local expenditure data indicates the Buckinghamshire study area generated £37.1 million on museums, theme parks, houses and gardens in 2024. Leisure expenditure, including population growth, is projected to increase by 38.2% by 2045. This growth would generate an additional £14.2 million by 2045. The household survey results suggest nearly 36% of households visit museums/ art galleries, but of these participating households only 17.2% of trips generated by the study area are retained within Buckinghamshire. Over 57% of participating households are attracted to facilities in London and over 10% are attracted to Oxford. Buckinghamshire's potential share of expenditure growth between 2024 and 2045 would be only £2.4 million, based on the current market share (17.2%).
- 5.31 There are a variety of activities in place to support tourism in Buckinghamshire, but the local tourism sector has historically been fragmented into a series of 'place based' campaigns for individual towns or parts of the County (e.g. the Chilterns). Buckinghamshire has been less successful in marketing the whole of the County as a destination with a brand that encompasses the various visitor experiences. Tourism in Buckinghamshire is built around historic creative and cultural sectors providing attractions, events and opportunities for visitors and residents. Culture and heritage tourism plays an important role in Buckinghamshire's visitor economy but a more holistic understanding of how this interacts with other aspects of the visitor economy is identified as the key to developing a strategy which can deliver economic growth.
- 5.32 The main destinations in Buckinghamshire specifically mentioned by local respondents in the household survey were as follows:
- Discover Bucks Museum, Aylesbury (2.7% of participating households);
  - Roald Dahl Museum and Story Centre, Great Missenden (1.1%);
  - Wycombe Museum, High Wycombe (0.9%);
  - Marlow Museum, Marlow (0.6%);

- Amersham Museum, Amersham (0.4%);
- Buckingham Old Gaol Museum, Buckingham (0.3%);
- Buckinghamshire Railway Centre, Quainton (0.3%);
- Waddesdon Manor, Waddesdon (0.2%);
- Chesham Museum, Chesham (0.2%); and
- Chiltern Open Air Museum, Chalfont St Peter (0.1%).

5.33 These low percentages suggest most of the visitors to these tourist attractions come from outside Buckinghamshire. The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision to support local growth in demand. However, there may be potential to increase Buckinghamshire's market share and attract more demand from tourist visitors if provision is improved. The development strategy for this sector needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

## **Health and fitness clubs**

5.34 The NPPF glossary indicates that some more intensive sport and recreational uses are included as main town centre uses. Indoor sports halls, swimming pools, pitches and courts are not considered to be intensive sport and recreational uses and are not main town centre uses. This section only assesses commercial health and fitness gyms and does not include sports halls.

5.35 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5.1 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of gym clubs dropped by 176 between 2019 to 2022. However, the latest 2024 UK Fitness Industry Report suggests a post-Covid recovery. The number of gym members was 10.7 million in 2024, a participation rate of 15.9% and the market value was £5.9 billion, which exceeds all pre-Covid levels.

5.36 The household survey results indicate nearly 29% of households visit health and fitness gyms, which is higher than the national average participation rate of less than 15%.

5.37 The Sport England/Active Places data indicates that there are 75 registered health and fitness facilities in Buckinghamshire (excluding Milton Keynes), with 3,705 fitness stations. The distribution of facilities and population is summarised in Table 5.3.

5.38 Existing provision compared with population is lowest in the rural zones i.e. Zone 2 - Buckinghamshire rural northeast (2.2 fitness stations per 1,000 people) and Zone 6 - Buckingham rural northwest (1.6 fitness stations per 1,000 people). However, the household survey results suggest these rural areas are currently served by health and fitness facilities primarily in Aylesbury. Health and fitness provision appears to be weakest in Zone 13 – Amersham/Chalfonts (3.7 fitness stations per 1,000 people); Zone 8 - Princes Risborough (4.2 fitness stations per 1,000 people); and Zone 4 – Aylesbury southeast/Wendover (4.9 fitness stations per 1,000 people).

Table 5.3 Health and fitness facilities in Buckinghamshire

<b>Zone / area</b>	<b>Number of clubs</b>	<b>Number of fitness stations</b>	<b>Population 2024</b>	<b>Fitness station per 1,000 people</b>
1 - Buckingham/Winslow	6	341	34,473	9.9
2 - Buckinghamshire rural northeast	2	81	36,644	2.2
4 - Aylesbury southeast/Wendover	6	198	40,195	4.9
5 - Aylesbury urban	9	527	61,526	8.6
6 - Buckingham rural northwest	3	67	41,003	1.6
8 - Princes Risborough	5	133	31,449	4.2
9 - Marlow	8	373	31,905	11.7
10/11 - High Wycombe	12	914	104,838	8.7
12 - Chesham/Great Missenden	5	263	52,203	5.0
13 - Amersham/Chalfonts	5	233	63,067	3.7
14 - Beaconsfield/Gerrards Cross	8	310	41,076	7.5
15 - Denham/Iver	6	265	31,660	8.4
<b>Total</b>	<b>75</b>	<b>3,705</b>	<b>570,039</b>	<b>6.5</b>

Source: Sport England. Note: no figures for Zones 3 and 7, which fall outside Buckinghamshire.

- 5.39 The 2024 population in the Buckinghamshire zones (excluding Zone 3 – Tring and Zone 7 - Thame/Chinnor) is 570,039, which indicates there is an average of 6.5 fitness stations per 1,000 people. The household survey results suggest Buckinghamshire retains just over 79% of gym trips in the study area (including Zones 3 and 7) equating to a catchment population of about 505,000 in 2024. Based on this 2024 estimated catchment population (505,000) there is an average of 7.3 fitness stations per 1,000 people.
- 5.40 The Sport England/Active Places data indicates that there are 1,259 registered health and fitness facilities in the South East Region, with 74,411 fitness stations, an average of 59 fitness station per facility. This provision equates to 7.8 fitness station per 1,000 people across the region. These figures suggest Buckinghamshire may have a current under provision of health and fitness facilities i.e. 234 stations.
- 5.41 Demand for additional facilities within Buckinghamshire should arise from future population growth and/or increased participation rates. Population within the study area is projected to increase to 774,894 in 2045, an additional 135,445 people. Buckinghamshire's catchment population in 2045 should be about 612,000 (79% of 774,894). Based on the South East Region average of 7.8 fitness per 1,000 people, Buckinghamshire's health and fitness catchment population (612,000 in 2045) could support 4,774 fitness station, compared with existing provision of 3,705 fitness stations, which is an additional 1,069 fitness stations by 2045. This projected additional demand could support 10 large or 20 medium sized facilities.
- 5.42 The priority areas for new facilities appears to be Amersham, Princes Risborough and Chesham/Great Missenden. New provision may also be required to serve new strategic housing developments.
- 5.43 The Requirements List suggests David Lloyd could be looking for new health and fitness facilities (4,000 to 6,000 sq.ft) in Aylesbury. Anytime Fitness could be looking for new health and fitness facilities (3,500 to 8,000 sq.ft) in Amersham, Chesham and/or Marlow. Hotpod Yoga could also have a space requirement in High Wycombe (1,800 sq.ft). UBX



Boxing and Health could be looking for space in Amersham (1,200 to 2,500 sq.m). X Club pilates could have a space requirement in Beaconsfield and/or Marlow (1,500 to 4,000 sq.ft).

## **Tenpin bowling and other indoor leisure innovations**

- 5.44 As indicated in Section 2, freed-up space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.
- 5.45 The household survey results indicate about 20% of households visit ten-pin bowling/gaming facilities and nearly 70% of the participating households visit facilities in Buckinghamshire.
- 5.46 There are two main tenpin bowling/family entertainment facilities in Buckinghamshire i.e. Hollywood Bowl in High Wycombe (22 lanes) and Rogue Leisure in Aylesbury (14 lanes). The nearest other facilities are tenpin outlets in Oxford (Hollywood Bowl – 24 lanes), Dunstable (GoBowling – 32 lanes), Milton Keynes (Hollywood Bowl – 18 lanes) and Watford (Hollywood Bowl – 14 lanes).
- 5.47 The Buckinghamshire study area's future 2045 population (774,894) can theoretically support 64 lanes, based on the national average of one lane per 12,000 people. There is theoretical capacity for 45 tenpin bowling lanes in Buckinghamshire based on the existing market share (69.8%) and national average of one lane per 12,000 people. The existing provision in Aylesbury (14 lanes) and High Wycombe (22 lanes) is sufficient to meet demand for the next 10 years but there may be longer term scope for a further nine lanes by 2045.
- 5.48 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 5.49 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.
- 5.50 The household survey results indicate 13.9% of respondents in the study area visit trampoline centres. Trampoline destinations mentioned by households participating in this activity were as follows:
- Rush UK Trampoline Park, High Wycombe (57.3% of participating households);
  - Gravity Active, Milton Keynes (4.5%);
  - Jump Inc, Bicester, OX26 6HR (3.7%);
  - Top Jump Inflatable Park MK, Milton Keynes (1.2%);
  - Jump In Trampoline Park, Slough (0.9%);

- Bounce Indoor Trampoline Park, Bletchley (0.8%);
- Flip Out, Aylesbury (0.7%);
- Flip Out, Hounslow (0.5%);
- Cloud 9 Leisure Inflatable Park, Hemel Hempstead (0.4%); and
- Flip Out, Hounslow (0.5%).

5.51 There may be potential scope for further provision in Buckinghamshire, but this sector is still relatively new and its potential for continued growth is unclear. Buckinghamshire's strategy should be flexible to respond to any emerging demand for a trampoline centre.

5.52 The number of escape rooms in the UK grew rapidly in the 4 years before the Covid pandemic, increasing from about 600 at the end of 2016 to over 1,500 by 2019. The market is fragmented and is still relatively new. There are three escape room facilities in Buckinghamshire in High Wycombe and Aylesbury. It is not clear whether this sector is approaching saturation point, therefore a flexible strategy is required.

5.53 The Requirements List suggests Escape Hunt could be looking for new escape room facility (3,000 to 4,500 sq.ft) in High Wycombe. Clip 'n' Climb have a requirement in Aylesbury (5,000 sq.ft).

## **Bingo, games of chance and gambling**

5.54 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

5.55 The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The Gambling Commission latest figures indicates the UK currently has:

- 582 bingo halls;
- 175 casinos;
- 1,405 adult gaming centres;
- 191 family entertainment centres; and
- 6,661 betting shops.

5.56 This equates to approximately one bingo facility per 93,000 adults, one casino per 310,000 adults and one family entertainment centre per 280,000 adults.

5.57 The household survey results indicate only 4.7% of respondents in the study area visit bingo facilities, just below the UK average participation rates of around 5%. The Raging Ball Members Club is the main bingo facility in Buckinghamshire, but bingo events are held at other venues on a part-time basis. Other Bingo destinations mentioned by households

participating in this activity were Buzz Bingo in Slough and Feltham and Mecca Bingo in Maidenhead, Luton and Hayes.

- 5.58 Buckinghamshire's market share of bingo trips in the study area is 58.5%. The adult population (about 500,000 in 2024) in the study area is theoretically capable of supporting five bingo facilities and 1.6 casinos, based on the UK averages. There could be potential for further bingo facilities in Buckinghamshire. However, the former Gala Bingo in Aylesbury sat vacant for over five years after closing in 2019 and has since been demolished as part of the Council's 'Pavilion Quarter' project to provide new public space and links across the town, which suggests there is no operator demand or express need to identify a site for a new bingo facility.

## **Hotels accommodation**

- 5.59 Visit England data indicates the number of domestic overnight visitor trips in England was 99.1 million in 2019, which generated 290.3 million nights (2.93 bed nights per trip). The number of visitor bed nights increased to 104.5 million trips and 310.2 million bed nights in 2022, the Covid-19 peak. However, the latest available data indicates the number of domestic overnight visitor trips in fell back to 99.4 million and 280.3 million bed nights in 2023, an average of 2.8 nights per visitor trip.
- 5.60 Visit Britain indicates the number of international visitors to the UK increased steadily between 2009 to 2019 from 31.1 million to 40.9 million visitors, an average annual increase of 2.8%. During the Covid-19 crisis the number of international visitors slumped to 7.0 million and 6.4 million in 2020 and 2021, respectively. However, inbound visitor numbers improved to 31.2 million in 2022 and 38.0 million in 2023. The visitors in 2023 generated 292.9 visitor nights, an average of 7.7 nights per visitor.
- 5.61 In 2019, Buckinghamshire attracted 20 million visitors, including 1.1 million overnight visitors. The total value of tourism to Buckinghamshire is £1.1 billion per year with domestic overnight visits contributing £157 million in 2019.
- 5.62 There are 1,054 accommodation establishments in Buckinghamshire (excluding Milton Keynes), of which 29% are serviced accommodation e.g. hotels, guest houses and pubs/inns. Most serviced accommodation providers in Buckinghamshire are small and independently owned.
- 5.63 The Requirements List suggests Travelodge could be looking for new hotel facilities (10,000 to 40,000 sq.ft) in Amersham, Chesham, Beaconsfield, Marlow and/or Gerrards Cross. Premier Inn could be looking for new hotel facilities in Aylesbury.

## **Office accommodation**

- 5.64 The Employment Land Review Volume 1 indicates Buckinghamshire contains around 725,000 sq.m of office floorspace, but the stock of office floorspace space has declined by 14.1% over the last 20 years. About 24% of this office floorspace is located within the 14 main town centres. The distribution in these centres is shown in Table 5.4. Office market signals are outlined in Employment Land Review.

Table 5.4 Office floorspace in Buckinghamshire town centres (sq.m)

<b>Town centre</b>	<b>Floorspace sq.m</b>
Aylesbury	81,598
High Wycombe	16,326
Marlow	16,235
Gerrards Cross	13,945
Beaconsfield Old Town	11,462
Chesham	9,700
Amersham on the Hill	7,728
Beaconsfield New Town	7,358
Buckingham	4,650
Great Missenden	1,792
Princes Risborough	1,760
Wendover	1,157
Amersham Old Town	662
Winslow	342

Source: VOA

- 5.65 Office space clusters in Buckinghamshire tend to be located within the town centres or close to the settlements alongside specific employment designations. The amount of office floorspace within town centres is quantified in the Employment Land Review. The Aylesbury figure in Table 5.4 is relatively high which reflects the widely drawn town centre boundary as defined in the Local Plan.
- 5.66 The increased level of home working during and after the Covid-19 lockdowns reduced the number of office employees visiting town centres. However, in Buckinghamshire this reduction will have been counter-balanced by less out-commuting into London and more people using shops and services in their place of residence during the daytime.
- 5.67 The Employment Land Review forecasts a minimum office floorspace requirement (gross) of about 206,510 sq.m gross over the plan period (2024 to 2045). This office floorspace is expected to require a total site area of 31.0 hectares.
- 5.68 The site assessments in the Employment Land Review identifies several potential development sites within town centres, where office use could form part of mixed-use developments, primarily High Wycombe and Aylesbury town centres. More detail of the sites appraised is shown in the Part A Employment Evidence Study.

## Conclusions on commercial leisure and other town uses

- 5.69 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted e.g. museums, art galleries, exhibition space, tourist attractions. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses, in particular, is likely to increase in Buckinghamshire because there will be gaps in provision. Given the fragmented nature of these sectors, it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

5.70 In global terms future expenditure growth could support new commercial leisure and cultural floorspace in Buckinghamshire of:

- about 6,000 sq.m by 2030;
- about 11,800 sq.m by 2035;
- about 18,186 sqm by 2040; or
- about 25,400 sq.m by 2045.

5.71 This additional floorspace could include:

- 10 large or 20 medium sized health and fitness facilities (about 1,070 new fitness stations in total);
- new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

5.72 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

## 6.0 **Implications for future policy**

### **Accommodating growth and change**

#### **National guidance**

- 6.1 For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:
- a defining a network and hierarchy of centres, allowing them to grow and diversify;
  - b defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
  - c allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 6.2 The NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. However, as indicated in Section 2, the changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) significantly restrict the Council's ability to control the mix of uses within centres through a plan-led approach.
- 6.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need to focus on providing a better service and experience. This enhanced experience could be improvements to the range of activities on offer (including innovative activities), the built environment and green infrastructure. The potential to provide a better mix of uses that extend activity throughout the daytime and into the evenings may also contribute to the viability and attraction of town centres.
- 6.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. This guidance suggests the emerging Local Plan should seek to accommodate projected growth up to 2035 as a minimum. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 6.5 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.

- 6.6 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 91). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 92).
- 6.7 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).
- 6.8 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. The latest projections from Experian suggest relatively modest levels of growth in on-line shopping when compared with previous trends. Nonetheless, the need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 6.9 As set out in Section 2, the UCO was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.

### **Floorspace capacity projections**

- 6.10 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been deducted. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.
- 6.11 The assessment of the potential for new retail, food/beverage and leisure/entertainment floorspace within the previous sections suggests there is modest long-term scope for new development within Buckinghamshire. Tables 6.1, 6.2 and 6.4 below summarise the floorspace projections in Buckinghamshire up to 2030, 2035 and 2045 (cumulative).
- 6.12 These projections assume Buckinghamshire can maintain its market share of expenditure in the future. This approach recognises that additional development within Buckinghamshire could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres e.g. Milton Keynes, Maidenhead, Oxford and Slough. A balanced and sustainable approach has been adopted.
- 6.13 Table 6.1 indicates there is a combined projected requirement for Buckinghamshire of just over 59,000 sq.m gross in 2035, this excludes zone that fall outside of Buckinghamshire i.e. Zones 3 and 7. By 2040, the combined cumulative requirement increases to nearly 93,000 sq.m gross (Table 6.2) and then to over 140,000 sq.m gross in 2045 (Table 6.3). These

combined floorspace capacity projections need to be considered in terms of the availability of existing vacant floorspace that may be suitable to accommodate this projected growth. The future distribution of population growth also needs to be considered. The projections assume an even spread of population growth across the study area zones.

Table 6.1 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2035 (sq.m gross)

Zone / area	Convenience retail	Comparison retail	Food/beverage	Leisure/cultural	Total
1/2 – Buckingham / Winslow	669	433	1,090	473	2,665
4/5/6 Aylesbury /Wendover	2,260	5,513	3,986	3,130	14,889
8 - Princes Risborough	369	360	577	420	1,726
9 – Marlow	531	759	2,489	1,344	5,123
10/11 - High Wycombe/Hazlemere	2,859	10,456	2,535	3,919	19,769
12 – Chesham	504	769	686	787	2,746
12 – Great Missenden	124	104	302	77	607
13 - Amersham/Chalfonts	1,008	1,063	2,342	867	5,280
14 – Beaconsfield / Gerrards Cross	1,345	859	2,708	655	5,567
15 – Denham/Iver	129	294	317	96	836
<b>Total</b>	<b>9,798</b>	<b>20,612</b>	<b>17,033</b>	<b>11,767</b>	<b>59,210</b>

Table 6.2 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2040 (sq.m gross)

Zone / area	Convenience retail	Comparison retail	Food/beverage	Leisure/cultural	Total
1/2 – Buckingham / Winslow	1,082	682	1,683	730	4,177
4/5/6 Aylesbury /Wendover	3,683	8,788	6,162	4,840	23,473
8 - Princes Risborough	608	570	892	648	2,718
9 – Marlow	857	1,195	3,846	2,076	7,974
10/11 - High Wycombe/Hazlemere	4,618	16,486	3,917	6,057	31,078
12 – Chesham	815	1,210	1,060	1,215	4,300
12 – Great Missenden	200	164	467	118	949
13 - Amersham/Chalfonts	1,628	1,672	3,619	1,340	8,259
14 – Beaconsfield / Gerrards Cross	2,171	1,351	4,184	1,013	8,719
15 – Denham/Iver	209	462	490	148	1,309
<b>Total</b>	<b>15,869</b>	<b>32,580</b>	<b>26,321</b>	<b>18,186</b>	<b>92,956</b>

Table 6.3 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2045 (sq.m gross)

Zone / area	Convenience retail	Comparison retail	Food/beverage	Leisure/cultural	Total
1 / 2 – Buckingham / Winslow	1,638	1,127	2,347	1,018	6,130
4/5/6 Aylesbury /Wendover	5,621	14,908	8,590	6,746	35,865
8 - Princes Risborough	933	954	1,244	904	4,035
9 – Marlow	1,296	1,975	5,363	2,894	11,528
10/11 - High Wycombe/Hazlemere	6,986	27,331	5,462	8,446	48,225
12 – Chesham	1,233	1,998	1,477	1,695	6,403
12 – Great Missenden	302	270	651	165	1,388
13 - Amersham/Chalfonts	2,463	2,759	5,047	1,869	12,138
14 – Beaconsfield / Gerrards Cross	3,284	2,230	5,834	1,412	12,760
15 – Denham/Iver	316	762	683	207	1,968
<b>Total</b>	<b>24,071</b>	<b>54,315</b>	<b>36,700</b>	<b>25,356</b>	<b>140,442</b>

Source: Tables 4.5, 4.6, 4.7 and 5.2. Note: no figures for Zones 3 and 7, which fall outside Buckinghamshire.



- 6.14 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections up to 2040 may need to be considered, allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.
- 6.15 The combined cumulative floorspace projection to 2045 is over 140,000 sq.m gross. As indicated in Section 2, long-term projections have inherent uncertainties, but it is better to plan for higher growth and then modify the strategy later if levels of growth are lower than originally predicted. Despite the uncertainties relating to very long-term projections, the emerging Local Plan should address floorspace projections up to 2035.
- 6.16 As indicated in Section 5, the Employment Land Review suggests further office space could be accommodated in town centres, primarily High Wycombe and Aylesbury town centres, over and above the floorspace projections for other main town centre uses. The floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. The floorspace projections in this report provide a starting point for the review of site-specific allocations and development management policies.
- 6.17 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provides an opportunity to enhance the evening and night-time economy in centres in Buckinghamshire, including the repurposing of retail floorspace. The emerging Local Plan should recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

### **Vacant shop premises**

- 6.18 The existing stock of premises should help to accommodate projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises should help to accommodate future growth.
- 6.19 Goad Plans (2022) and Lichfields' land use surveys (2023) indicate there were 259 vacant shop units within the 14 designated centres in Buckinghamshire, an average vacancy rate of 12.6%, which is slightly below the UK average (14.4%), but above the pre-Covid UK average (12.4%). The total amount of vacant floorspace in the 14 centres assessed was 42,795 sq.m gross, an average of 165 sq.m per vacant unit. However, the Council's Economy, Investment and Regeneration department's quarter 4 – 2024 figures suggest a lower number of vacant units (188 units), of which 67 units (36%) were either under offer, subject to planning or part of wider redevelopment schemes.
- 6.20 As an example, it may be reasonable to assume the shop unit vacancy rate could reduce to around 10% across centres in Buckinghamshire, as a minimum. If achieved this reduction in the shop unit vacancy rate could theoretically accommodate about 14,300 sq.m of new uses, which is only a quarter of the projected combined retail, food/beverage and leisure/entertainment floorspace under-supply up to 2035 (59,210 sq.m gross). On this basis, reoccupied vacant floorspace could be distributed as follows:

- High Wycombe 8,300 sq.m gross
- Aylesbury 3,700 sq.m gross
- Gerrards Cross 1,500 sq.m gross
- Beaconsfield Old Town 300 sq.m gross
- Prince Risborough 200 sq.m gross
- Chesham 100 sq.m gross
- Buckingham 100 sq.m gross
- Great Missenden 100 sq.m gross.

- 6.21 There may also be potential in other town centre where the vacancy rate is currently below 10%. The re-occupation of vacant floorspace and the need to bring forward new development, over and above this, will need to be considered in the context of the Council's emerging spatial strategy.
- 6.22 The floorspace projections to 2040 suggest there is a quantitative need to increase the combined amount of retail, food/beverage and leisure/entertainment floorspace in Buckinghamshire, over and above the potential re-occupation of vacant floorspace.
- 6.23 The changes to the UCO and PDR, as described in Section 2, will provide more flexibility for landowners to change the use of retail premises to other town centre uses and residential and restrict Buckinghamshire's ability to control the mix of uses in the future.
- 6.24 The capacity projections in this update suggest there is a need to allocate sites for retail and leisure development to accommodate projected growth up to 2040. However, the priority in the short term up to 2030 will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses.
- 6.25 The floorspace projections suggest there is a need to retain the existing stock of shop premises within designated centres to accommodate future growth. The need for Article 4 Directions to remove permitted development rights could be considered in areas with limited vacancy rates and where there is pressure for alternative uses that could undermine the vitality and viability of the town centre.
- 6.26 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.
- 6.27 However, the Council will need to be cognisant of competing demands for land within the town centres including for both employment and residential development, as well as wider administrative, health, and education needs to support a growing population when identifying sites for the emerging Local Plan. In practice the Council may wish to pursue a balanced mix of uses in order to continue the diversification of the centres, albeit this will depend on the broader spatial strategy for housing development across the Local Plan.

## Hierarchy of centres

- 6.28 The network of town centres across Buckinghamshire is set out in the various adopted development plans. The Buckinghamshire Regeneration Framework identifies the largest town and villages. The immediate focus of “Regeneration Bucks” will be the three centres of Aylesbury, Chesham and High Wycombe, which provide the key opportunities for development and investment. Principle One of the Framework seeks to ensure the creation of a strong network of towns in Buckinghamshire. Consistent with this objective, continuing to identify the hierarchy of centres in the emerging Local Plan is important in terms of:
- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
  - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
  - identifying a viable role and strategy for each centre.
- 6.29 The analysis of centres in Section 3 and the appendices indicates that amendments to the hierarchy of centres is necessary to ensure consistency across Buckinghamshire. The boundaries of Buckinghamshire’s town, district and local shopping centres should be defined on the new Proposals Map.
- 6.30 The Succeeding as A Place - Vision for Buckinghamshire to 2050 seeks to protect and promote Buckinghamshire’s cultural heritage by ensuring a diverse and responsive range of offerings the County, and town centres will be an important element of this approach. The Vision indicates the distinctive character, role and heritage of centres need to be retained, protected and enhanced. The distinctive nature of centres can be enhanced by designing new buildings, streets and open spaces that reflect best practice solutions.
- 6.31 As the largest centres with the widest trade draw, Aylesbury and High Wycombe should be designated as *Sub-Regional Town Centres* at the top of hierarchy. They have a more important comparison goods shopping and leisure/entertainment role than the small Town Centres. However, the combined retail, food/beverage and leisure floorspace capacity projections up to 2040 suggest only 31% of the projected floorspace capacity could be provided in Aylesbury and there is a negative floorspace capacity projection in High Wycombe. These two town centres have the highest concentration of vacant floorspace, suggesting these centres could accommodate more growth than that suggested by existing shopping and leisure patterns. Their role should continue to provide the focus for major retail and leisure development in Buckinghamshire serving communities within the northern and southern halves of the authority area. These centres are the most accessible centres, supporting the largest range of services, job opportunities and sources of recreation.
- 6.32 The other smaller centres in Buckinghamshire could be re-categorised as either *Town*, *District* or *Local Centres*. Based on the number of outlets, amount of floorspace and relative importance suggested by the household survey results, the following hierarchy designations as shown in Table 6.4, could be considered for the new Local Plan.
- 6.33 The seven second tier *Town Centres* are much smaller than Aylesbury and High Wycombe and have more localised primary catchment areas. These *Town Centres* have between 100 to 200 outlets and over 10,000 sq.m floorspace. These centres are relatively freestanding

and self-contained catchment area and have a reasonable selection of comparison goods shops. All *Town Centres* have large food stores (over 1,000 sq.m net) suitable for main and bulk food shopping.

- 6.34 The *District Centres* are smaller (50 to 100 outlets and have less than 10,000 sq.m floorspace) and have less self-contained catchment areas. These centres are relatively close to a larger centre and fall within the primary catchment area of that more dominant centre. *District Centres* provide a more limited choice of comparison goods shopping than the larger *Town Centres* and tend to have smaller food stores (less than 1,000 sq.m net) suitable for basket and top up food and grocery shopping rather than main and bulk food shopping.
- 6.35 *Local Centres* have less than 50 outlets and less than 5,000 sq.m floorspace. The primary catchment area of *Local Centres* serve the respective settlement and a small rural hinterland. *Local Centres* have a small range and choice of comparison goods shops and have basket/top-up food and grocery shopping facilities rather than large stores suitable for main and bulk food shopping. These smaller centres are important in providing day-to-day facilities for residents, preventing the need travel longer distances (often by car) to meet these needs. The role of district and local centres should continue to be protected.

Table 6.4 Suggested town, district and local centres designations in Buckinghamshire

Centre	Development plan designation	Number of units	Floorspace sq.m
Aylesbury	Sub-Regional Town Centre	333	121,670
High Wycombe	Sub-Regional Town Centre	414	77,700
Amersham on-the-Hill	Town Centre	160	22,620
Beaconsfield New Town	Town Centre	125	29,010
Buckingham	Town Centre	136	14,770
Chesham	Town Centre	168	27,500
Gerrards Cross	Town Centre	124	21,820
Marlow	Town Centre	206	35,300
Princes Risborough	Town Centre	103	14,810
Amersham Old Town	District Centre	59	11,494
Beaconsfield Old Town	District Centre	63	8,590
Burnham	District Centre	approx. 75	n/a
Chalfont St. Peter	District Centre	approx. 80	n/a
Great Missenden	District Centre	52	4,024
Wendover	District Centre	61	6,330
Winslow	District Centre	56	3,249
Bourne End	Local Centre	approx. 50	n/a
Chalfont St Giles	Local Centre	approx. 30	n/a
Denham Green	Local Centre	approx. 15	n/a
Farnham Common	Local Centre	approx. 35	n/a
Flackwell Heath	Local Centre	approx. 35	n/a
Haddenham	Local Centre	approx. 15	n/a
Hazlemere/Tylers Green	Local Centre	approx. 25	n/a
Holmer Green	Local Centre	approx. 15	n/a
Iver	Local Centre	approx. 30	n/a

Centre	Development plan designation	Number of units	Floorspace sq.m
Little Chalfont	Local Centre	approx. 50	n/a
Prestwood	Local Centre	approx. 25	n/a

- 6.36 This network of town, district and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

## Impact and sequential tests

- 6.37 Future Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres and not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold.

### Impact threshold

- 6.38 The NPPF indicates, if there is no locally set threshold, then the default impact threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
  - the existing viability and vitality of town centres;
  - cumulative effects of recent developments;
  - whether local town centres are vulnerable;
  - the likely effects of development on any town centre strategy; and the impact on any other planned investment.
- 6.39 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.
- 6.40 The NPPF minimum threshold of 2,500 sq.m gross is an inappropriate threshold for all centres/settlements across Buckinghamshire because this scale of development would exceed the overall long-term retail/food beverage/leisure projections in some centres in Buckinghamshire. The relatively high vacancy rates in some centres and uncertainties about the on-going cost-of-living crisis suggest town centres are now more vulnerable to out-of-centre developments.
- 6.41 Given the overlapping nature of catchment areas in Buckinghamshire, particularly in the southern half of Buckinghamshire, a consistent impact threshold could be applied across the authority area. Based on the retail floorspace capacity projections set out in Tables 6.1, 6.2 and 6.3 a lower impact threshold in line with the Sunday trading limit (around 400 sq.m gross or 280 sq.m net sales) is appropriate for all centres except Aylesbury and High Wycombe, to protect the vitality and viability of designated centres in Buckinghamshire.

- 6.42 The Vale of Aylesbury Local Plan adopts a 1,500 sq.m gross impact threshold for Aylesbury and a 400 sq.m threshold for the rest of the authority area. The Aylesbury health check in Appendix 6 suggests the vacancy rate has increased in the town centre in recent years and the new retail floorspace capacity projections are much lower. This recent evidence suggests the minimum impact threshold should be reduced from 1,500 sq.m.
- 6.43 The Wycombe Delivery and Sites Allocation DPD adopted a lower local impact threshold of 1,000 sq.m gross for High Wycombe and a 500 sq.m threshold in the rest of the District. A consistent impact threshold of 1,000 sq.m gross could be considered for Aylesbury and High Wycombe and 400 sq.m elsewhere.
- 6.44 All retail and leisure developments over 1,000 sq.m gross (combined) in Aylesbury and High Wycombe 400 sq.m gross (combined) elsewhere, proposed outside or on the edge of designated town and local centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

#### **Implications of UCO changes for the impact and sequential tests**

- 6.45 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, Local Plan policies relating to the impact test should refer to *retail* and *leisure* uses rather than Class E within the new UCO. Clearly movement within Class E does not require planning permission, therefore an impact assessment would not be required in these circumstances. The use of planning conditions to restrict the mix of Class E uses within new development will need to be considered on a case-by-case basis.

#### **Sequential test floorspace threshold**

- 6.46 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “*particular market and locational requirements that mean they may only be accommodated in specific locations*”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow local facilities to be provided in areas that are poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test. The Central Government Policy Paper – Unleashing rural Opportunity (June 2023) recognises the challenges faced in rural areas including the sparsity and distance to key facilities. Given the rural nature of many parts of Buckinghamshire, a minimum floorspace threshold of 400 sq.m gross could be applied outside the 14 main settlements.

## **Town centre boundaries and development strategy**

- 6.47 Development plan should define clear boundaries for town, district and local shopping centres on the Proposals Map, where development for retail, leisure and other main town centre uses will be focused. Designated town, district and local shopping centre boundaries, where possible, should be tightly drawn to assist in controlling the appropriate scale and nature of development. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 6.48 The continued identification of town, district and local centre boundaries and primary shopping areas (PSA) in larger town centres are important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail and other town centre uses should be the PSA for retail uses and the wider town centre boundary for other town centre uses. However, in some circumstances where a centre is small, the town centre and PSA will cover the same area. Based on Lichfields' analysis of centres, a separate PSA is unlikely to be necessary except for Aylesbury and High Wycombe.
- 6.49 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail and many other town centre uses.
- 6.50 The area of search for sequential sites, i.e. relevant centres, will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve. These factors should be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant, for example where local facilities are proposed to serve a new residential or employment development.
- 6.51 The retail, food/beverage and leisure floorspace capacity projections suggest the contraction of town centre boundaries is unnecessary. The expansion or contraction of centre boundaries and scope for development should be considered on a centre-by-centre basis, as outlined below.
- 6.52 The contraction of centre boundaries would only be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential areas or non-commercial gaps in frontages and/or a concentration of vacant shop units.

### **Aylesbury**

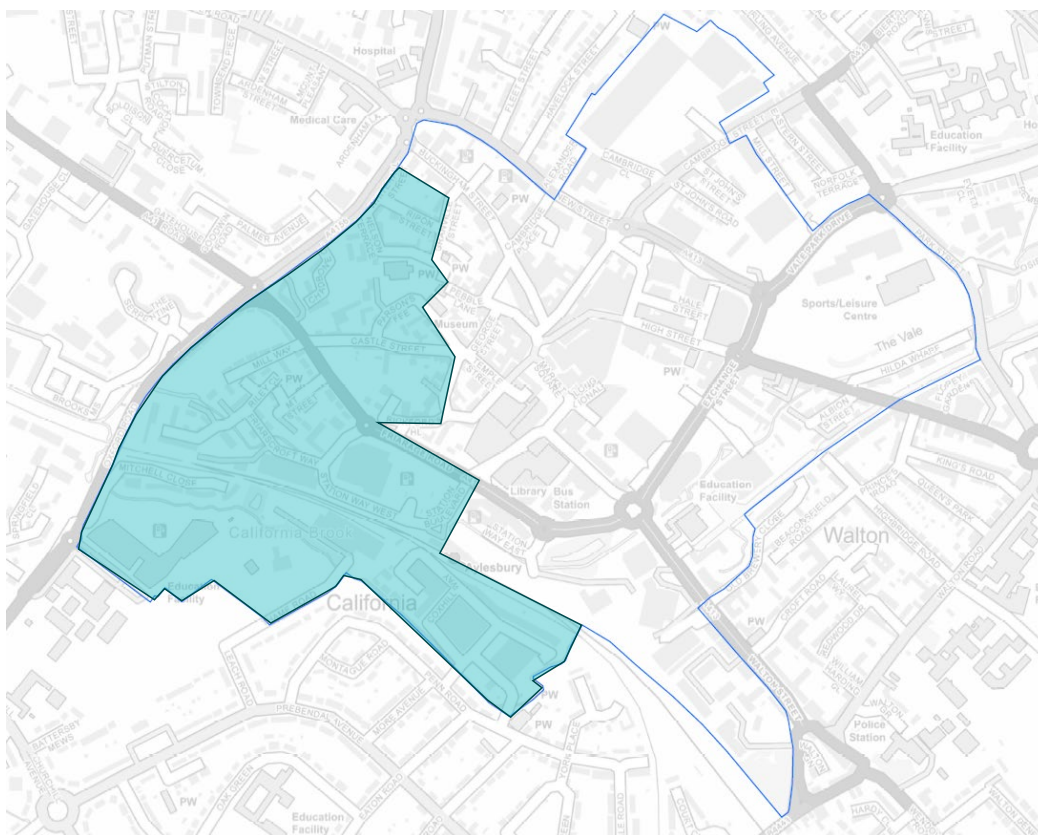
- 6.53 The Buckinghamshire Regeneration Framework indicates Aylesbury provides the largest regeneration opportunity. Several projects are proposed to create a vibrant town centre that combines retail, urban living, social interaction, community and economic activity.
- 6.54 Aylesbury is the primary retail and leisure destination within study area zones 4, 5 and 6. Aylesbury has an important comparison goods shopping and leisure/entertainment role, which should be protected. It should be designated as *Sub-Regional Town Centres* at the

top of the hierarchy. The Vale of Aylesbury Local Plan also indicated that Aylesbury should continue to be the main location for growth to prevent leakage to neighbouring towns. The Council's emerging Aylesbury Regeneration Strategy indicates the regeneration of the town centre should address the disparity between the town and its wider catchment potential.

- 6.55 Based on current market shares the combined retail, food/beverage and leisure floorspace projection for these zones is 14,889 sq.m by 2035 increasing to 23,473 in 2040 and then to 35,865 sq.m in 2045. Vacant floorspace in Aylesbury in 2023 was 9,250 sq.m. Assuming a reduction in the shop vacancy rate from 16.5% to 10%, suggests, as a minimum, there is scope to accommodate about 3,700 sq.m gross, leaving a residual requirement of about 18,600 sq.m in 2035. Vacant space is not sufficient to accommodate growth over the plan period.
- 6.56 Some of the 2035 residual need (18,600 sq.m) should be accommodated in large residential and employment allocations, in the form of new local centres/parades, to serve the day-to-day needs of new residents/employees. However, the scale of local facilities should be commensurate to the resident population or number of employees.
- 6.57 As a broad rule of thumb, a development of 500 new homes is projected to generate additional retail, food/beverage and leisure expenditure of about £12.5 million in 2040. Local shop and services should seek to retain about 40% of this expenditure (£5 million). Based on a combined average sales density of £10,000 per sq.m gross in 2040, this expenditure could support a local centre of about 500 sq.m gross. The precise scale and mix of local shops and services provision within strategic allocations will need to be determined on a case-by-case basis, taking account the scale and phasing of residential/employment development and existing provision available. The impact on nearby designated centres will also need to be considered.
- 6.58 The current town centre boundary for Aylesbury is widely drawn, including large predominantly residential areas where there are limited main town centre uses. The town centre boundary should be more tightly drawn to exclude the area is shown in Figure 6.1, which includes residential areas between the PSA and Oxford Road, bounded by the railway line and Buckingham Street; the Morrison's store; and all areas south of the railway line.



Figure 6.1 Aylesbury town centre boundary – proposed area for exclusion



Source: Vale of Aylesbury Local Plan

- 6.59 The PSA is tightly drawn around the core shopping area. The PSA includes a large area allocated for town centre redevelopment in the Vale of Aylesbury Local Plan. This redevelopment area includes the Exchange Street car park, the unpedestrianised east end of the High Street, the former Wilko store and Upper Hundred car park. The Council's Aylesbury Regeneration Strategy indicates there are development opportunities in the town centre with land assembly already underway. The strategy identifies 11 sites and development opportunities within the town centre (about 11 hectares, including the area already allocated in the Local Plan). These sites have the potential for mix use development including, residential, retail, leisure, hotel and other town centre uses, and
- 6.60 These sites and opportunity areas could be capable of accommodating any residual long-term floorspace capacity up to 2035, i.e. up to 18,600 sq.m.
- 6.61 On balance, considering the likely long-term floorspace capacity, the availability of vacant floorspace and the potential to redistribute capacity from other towns, no amendments to the PSA or proposed redevelopment area are recommended. Future policy should indicate retail uses within Class E should be focused in the PSA and other main town centre uses can be focused in the wider town centre area, consistent with the sequential approach.
- 6.62 The Aylesbury town centre health check set out in Appendix 6 indicates the centre is relatively healthy and vibrant. The centre is rated highly for 17 of the Institute of Place Management's 25 vital and viable factors. The future priorities should aim to improve safety/crime and create more opportunities for innovation, experimentation.

Improvements to the appearance and place management of the centre to enhance the visitor experience are also potential areas of improvement.

### **Chesham**

- 6.63 The Buckinghamshire Regeneration Framework identifies Chesham as having a rich heritage and an important commercial, civic, leisure and community function. The potential to expand the night-time economy is highlighted.
- 6.64 The combined retail, food/beverage and leisure floorspace projection for Chesham is 2,746 sq.m by 2035 increasing to 4,300 sq.m in 2040 and then 6,403 sq.m gross in 2045. The existing shop vacancy rate is relatively low (10.7%). Vacant floorspace (2,070 sq.m) in Chesham is unlikely to accommodate all the long-term floorspace projections. However, the M&Co store (ground floor of 860 sq.m. gross) has closed since the Goad survey in 2022. This vacated store and small-scale extensions and redevelopments can accommodate much of the residual need for additional floorspace up to 2035.
- 6.65 Chesham town centre boundary is tightly drawn around the existing retail and commercial premises. The Principal Shopping Frontages include the pedestrianised sections of the High Street, but excludes peripheral shop frontages on Broad Street, Market Square, Red Lion Street and White Hill. Based on the modest floorspace projections, no amendments to the town centre boundary are recommended. Future policy should indicate retail and other town centre uses should be focused in the town centre area, consistent with the sequential approach. The need for Principal Shopping Frontages is addressed later in this Section.
- 6.66 The Chesham town centre health check set out in Appendix 7 indicates the centre is performing satisfactorily. The centre is rated highly for 5 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve adaptability, innovation and experimentation.

### **High Wycombe**

- 6.67 The Buckinghamshire Regeneration Framework indicates High Wycombe is Buckinghamshire's largest town. The strategy seeks to transform the area as a thriving and resilient town centre and investment in public realm improvements are proposed. High Wycombe has the largest catchment population.
- 6.68 Based on current market shares, the combined retail, food/beverage and leisure floorspace projection for High Wycombe is 19,769 sq.m gross in 2035, increasing to 31,078 sq.m gross in 2040 and the to 48,225 sq.m gross in 2045. Vacant floorspace could accommodate about 8,300 sq.m, leaving a residual requirement of about 11,500 sq.m in 2035. Vacant space is not sufficient to accommodate growth over the plan period.
- 6.69 As in Aylesbury, some of the 2035 residual need (11,500 sq.m) should be accommodated in large residential and employment allocations, in the form of new local centres/parades, to serve the day-to-day needs of new residents/employees.
- 6.70 The High Wycombe town centre boundary is widely drawn, including employment areas to the west and east, the civic area and the hospital and university areas to the south. However, the boundary (correctly) excludes predominantly residential areas. The PSA is drawn tightly around the core shopping area.

- 6.71 The Wycombe Delivery and Site Allocations Plan includes 15 development allocations within the wider town centre area, including four within the PSA. The eight sites allocated for mixed use including main town centre uses (retail, food/beverage and leisure), were:
- HWTC10 Swan Frontage – main town centre and residential uses;
  - HWTC12 Chilterns Shopping Centre and Frogmoor East – retail, restaurants, hotels, pubs and commercial leisure (residential on upper floors);
  - HWTC13 Lily’s Walk – mixed use comprising main town centre and residential uses;
  - HWTC14 Buckingham House and Castle House – main town centre and residential uses;
  - HWTC15 Collins House/Bridge Street/Desborough Road – main town centre uses (residential on upper floors);
  - HWTC16 Oxford Road Roundabout – main town centre uses (residential on upper floors);
  - HWTC17 Bridge Street – main town centre uses (residential on upper floors); and
  - HWTC19 Rapid House – main town centre and residential uses.
- 6.72 Some of these sites have been fully or partially developed (e.g. HWTC13 and HWTC14). HWTC17 has planning permission for education buildings. HWTC10 and HWTC16 have been assessed in the ELR and are identified for retention as employment sites with limited development potential. HWTC15 had planning permission for a residential led development and a new application has been submitted. These site allocations are unlikely to deliver a significant level of additional retail or leisure development.
- 6.73 Given the residual need up to 2035, no contraction or expansion of the High Wycombe town centre or PSA is recommended. As in Aylesbury, future policy should indicate retail uses within Class E should be focused in the High Wycombe PSA and other main town centre uses can be focused in the wider town centre area, consistent with the sequential approach.
- 6.74 The High Wycombe town centre health check set out in Appendix 8 indicates the centre is performing reasonably well, although the shop vacancy rate is higher than average. The centre is rated highly for 16 of the Institute of Place Management’s 25 vital and viable factors. The future priorities should be to improve safety/crime, the appearance of the centre and innovation/experimentation.

### **Amersham/Chalfonts**

- 6.75 The combined retail, food/beverage and leisure floorspace projection for Amersham and the Chalfont settlements is 5,280 sq.m by 2035, increasing to 8,259 sq.m in 2040 and then to 12,138 sq.m in 2045. Existing vacant floorspace in Amersham (1,423 sq.m in the two centres) alone cannot accommodate a significant amount of this floorspace projection. Some of the residual need could be accommodated in large residential and employment allocations.
- 6.76 The Chiltern and South Bucks Town Centres and Leisure Study Peer Review and Update (2019) identified three potential development sites in Amersham on the Hill and two sites

in Chalfont St. Peter. These five sites had an estimated physical capacity of 7,700 sq.m gross, but not all the sites were expected to be delivered. The sites considered as potentially suitable and with the best potential for delivery were East Building Supplies and the Postal Sorting Office in Amersham on the Hill with a combined capacity of about 3,700 sq.m gross. The library/ambulance station in Chalfont St. Peter was estimated to accommodate 500 sq.m gross. However, these sites are not allocated for development and there is no certainty they will come forward for development. Some residual capacity could be accommodated in vacant units available in smaller local centres e.g. Little Chalfont and Chalfont St Giles.

- 6.77 Amersham on the Hill town centre boundary is tightly drawn around the existing retail and commercial premises and includes the two potential development sites mentioned above. Amersham Old Town's boundary includes the Tesco store and its car park but is tightly drawn around the commercial uses on the High Street, Broadway and Whielden Street.
- 6.78 For consistency, the new Local Plan should identify a Town Centre boundary for Amersham on the Hill and a District Centre boundary for Old Amersham. Based on the floorspace projections, no contraction of the two Amersham centre boundaries is recommended. Future policy should indicate retail and other main town centre uses should be focused in the Amersham on the Hill town centre area, consistent with the sequential approach.
- 6.79 The Amersham on the Hill town centre health check set out in Appendix 10 indicates the centre is performing satisfactorily. The centre is rated highly for 7 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the availability of opportunities for new businesses. Amersham Old Town's health check in Appendix 9 indicates the centre has a unique role with a high-quality niche market of independent and national retailers and restaurants. It is only rated highly for 7 of the vital and viable factors, but scores poorly in terms of the diversity of its retail offer and adoptability of its premises. Given the proximity to Amersham on the Hill this niche role should be retained and diversification of its offer may be unnecessary. Improved physical linkages between the two centres, the railway station and with the Tesco superstore should be a priority.

### **Beaconsfield**

- 6.80 The combined retail, food/beverage and leisure floorspace projection for Zone 14 (Beaconsfield and Gerrards Cross) is 5,567 sq.m by 2035 increasing to 8,719 sq.m in 2040 and then to 12,760 sq.m in 2045. Existing vacant floorspace (2,630 sq.m) in the two centres in Beaconsfield could accommodate some of this floorspace projection. Some of the residual need could be accommodated in large residential and employment allocations.
- 6.81 The Chiltern and South Bucks Town Centres and Leisure Study Peer Review and Update (2019) identified four potential development sites in Beaconsfield, with an estimated physical capacity of 5,000 sq.m gross. The sites were: ATS Tyres on Warwick Road; Revolution Public House on Maxwell Road; Burkes Road/Gregories Road car park; and Mercedes Benz on Station Road. These sites are not allocated for development and there is no certainty they will come forward for development.
- 6.82 For consistency, the new Local Plan should identify a Town Centre boundary for Beaconsfield New Town and a District Centre boundary for Beaconsfield Old Town. The

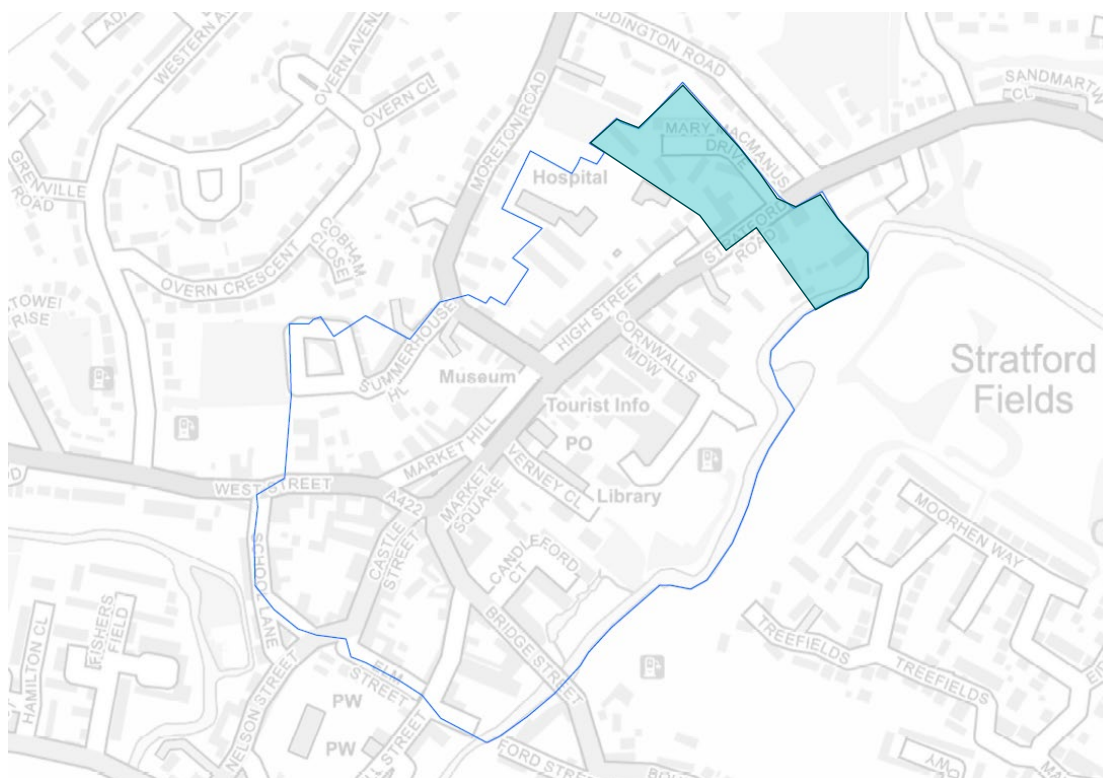
Beaconsfield New Town Centre boundary, as shown on the South Bucks District Development Plan proposals map is tightly drawn around the commercial area. The Local Centre Frontages in Beaconsfield Old Town are also tightly drawn around the existing shops and services.

- 6.83 Based on the floorspace projections, no contraction of the two Beaconsfield centre boundaries is recommended. Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach.
- 6.84 The Beaconsfield New Town health check set out in Appendix 11 indicates the centre is performing satisfactorily. The centre is rated highly for 6 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the availability of opportunities for new businesses. Beaconsfield Old Town's health check in Appendix 12 indicates the centre has a complementary role. It is only rated highly for 4 of the vital and viable factors and scores poorly in terms of the diversity and adoptability of its premises. Given the proximity to Beaconsfield New Town, its niche role should be retained and diversification may be unnecessary. Improved physical linkages between the two centres and nearby attractions should be a priority.

### **Buckingham**

- 6.85 The combined retail, food/beverage and leisure floorspace projection for Zones 1 (Buckingham and Winslow) is 2,665 sq.m by 2035 increasing to 4,177 sq.m in 2040 and then to 6,130 sq.m in 2045. Existing vacant floorspace (1,480 sq.m) in Buckingham could accommodate some of the short-term 2035 floorspace projection. Vacant space is not sufficient to accommodate growth over the plan period. Some of the residual need could be accommodated in large residential and employment allocations.
- 6.86 The Vale of Aylesbury Adopted Local Plan identifies a relatively wide town centre boundary, which includes predominantly residential areas on the periphery. No PSA or shop frontages are identified in the Local Plan but the Buckingham Neighbourhood Plan identifies Primary and Secondary Retail Frontages.
- 6.87 The town centre boundary could be more tightly drawn to exclude the residential areas to the north of the centre e.g. Mary Macmanus Drive, Northend Square and Stratford Road east of Cecil's Yard, as shown in Figure 6.2.

Figure 6.2 Buckingham town centre boundary – proposed area for exclusion



Source: Vale of Aylesbury Adopted Local Plan

- 6.88 New residential development to the west of the centre at Summerhouse Hill could also be excluded from the centre boundary. Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach.
- 6.89 The Adopted Local Plan identified nine development sites within the town centre boundary, either commitments or neighbourhood plan allocations. Mixed-use development on some of these sites and vacant shop floorspace should be sufficient to accommodate projected capacity up to 2035.
- 6.90 The Buckingham town centre health check set out in Appendix 13 indicates the centre is performing satisfactorily. The centre is rated highly for 6 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the adaptability of available premises.

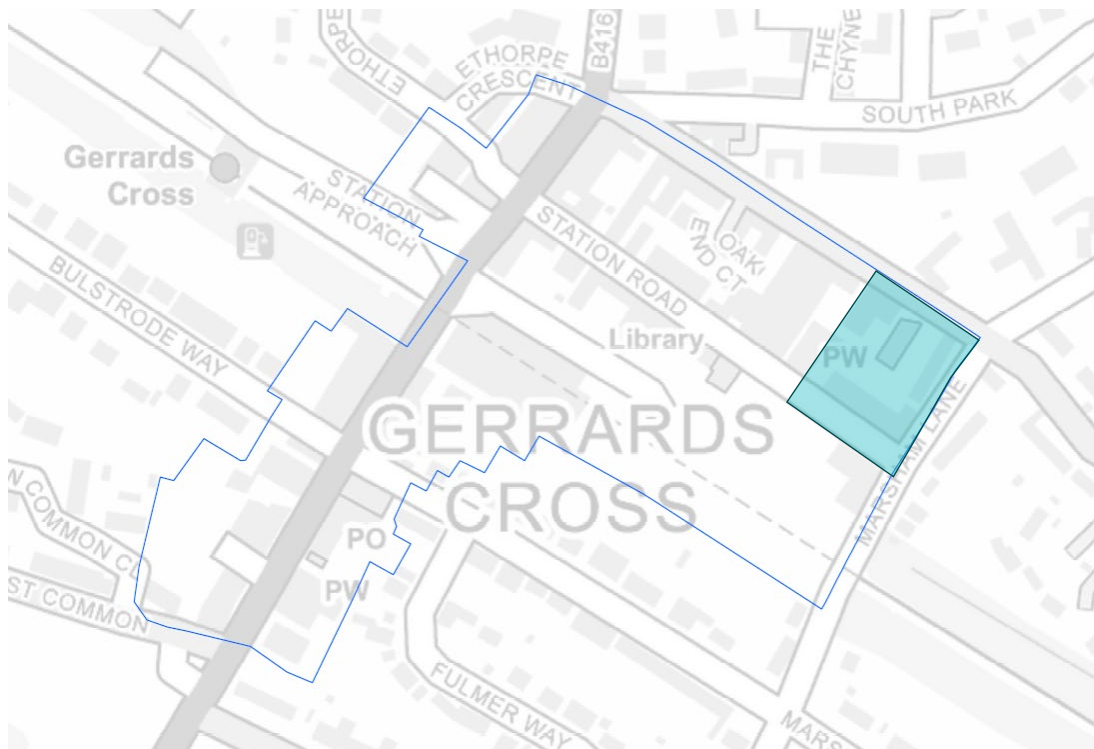
### Gerrards Cross

- 6.91 The combined retail, food/beverage and leisure floorspace projection for Zone 14 (Beaconsfield and Gerrards Cross) is 5,567 sq.m by 2035 increasing to 8,719 sq.m in 2040 and then to 12,760 sq.m in 2045. Existing vacant floorspace (3,490 sq.m) in Gerrards Cross can accommodate some of this long-term capacity requirement. Some of the residual need could be accommodated in large residential and employment allocations.
- 6.92 The Gerrards Cross town centre boundary is relatively tightly drawn around the commercial area. The Tesco store should be included within the town centre boundary to protect its important anchor role in the future. Residential uses on Marsham Lane and the east end of



Station Road and Oak End Way should be excluded from the town centre boundary, as shown in Figure 6.3.

Figure 6.3 Gerrards Cross town centre boundary - proposed area for exclusion



Source: South Bucks Core Strategy Proposals Map

- 6.93 Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach. The need for separate primary and secondary frontages is addressed later.
- 6.94 The Gerrards Cross town centre health check set out in Appendix 14 indicates the centre is performing satisfactorily. The centre is rated highly for 6 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the appearance of the centre, innovation and experimentation.

### Great Missenden

- 6.95 Great Missenden falls within the overlapping catchment areas of several centres including Chesham, Aylesbury and High Wycombe. The combined retail, food/beverage and leisure floorspace projection for Great Missenden is 607 sq.m by 2035 increasing to 949 sq.m in 2040 and then to 1,388 sq.m in 2045. Existing vacant floorspace (646 sq.m) in Great Missenden could accommodate some of these floorspace projections. Some of the residual need could be accommodated in large residential and employment allocations.
- 6.96 The designated Shopping Area in the Chiltern Local Plan is tightly drawn around the commercial area. For consistency, the new local plan should identify a District Centre boundary to cover the current designated shopping area. Based on the floorspace projections, no contraction of the Great Missenden centre boundary is recommended.

Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach.

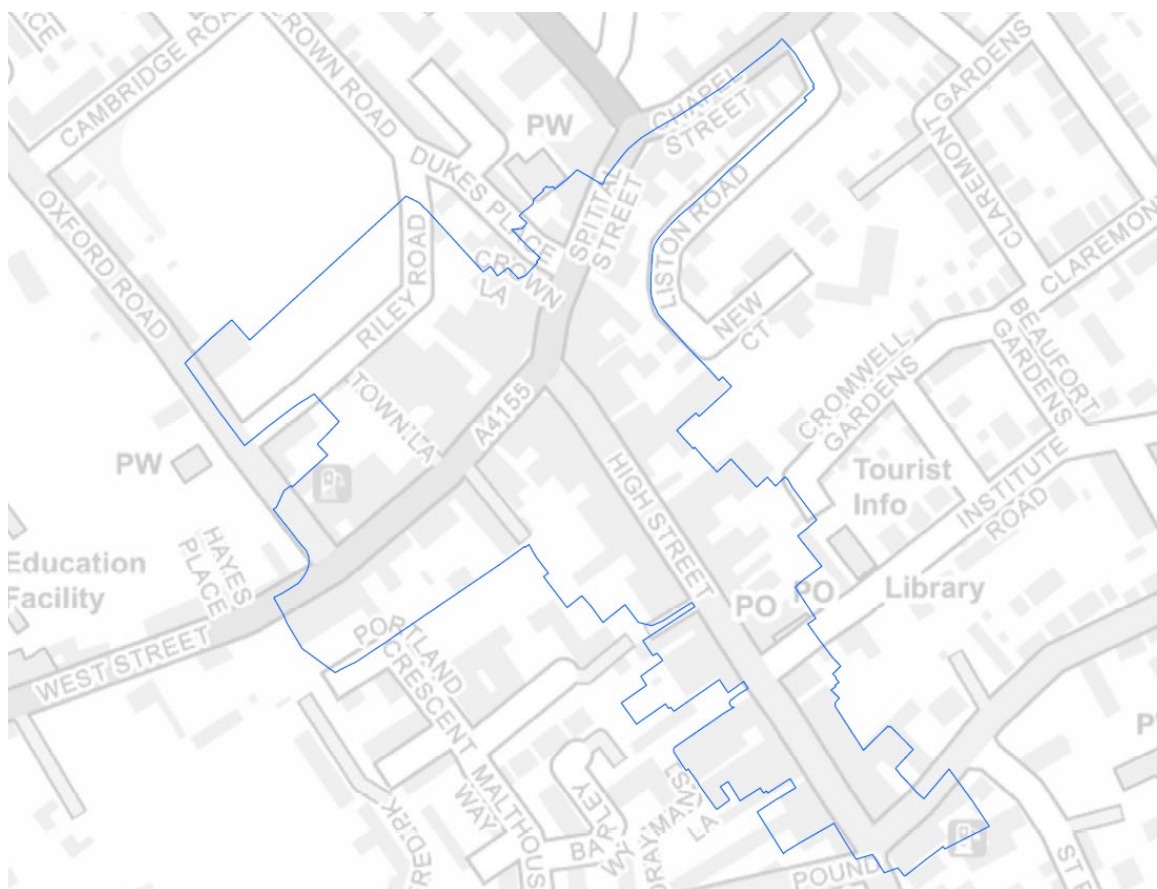
- 6.97 The Great Missenden town centre health check set out in Appendix 15 indicates the centre is performing satisfactorily for a small centre, although it could capitalise on additional tourist visitors attracted to the Roald Dahl Museum. The centre is only rated highly for four of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve adaptability and the range of shops and services available.

### **Marlow**

- 6.98 The combined retail, food/beverage and leisure floorspace projection is 5,123 sq.m by 2035 increasing to 7,974 sq.m in 2040 and then to 11,528 sq.m in 2045. Existing vacant floorspace (2,180 sq.m) in Marlow could accommodate a small element of this floorspace projection. Some of the residual need could be accommodated in large residential and employment allocations.
- 6.99 The Marlow town centre boundary is very widely drawn, including large residential areas surrounding the designated PSA area, which is more tightly drawn around the existing commercial uses. Higginson Park, Riley Park and the Rookery Park are also included within the town centre boundary. Marlow is a relatively small centre and does not have significant employment or civic areas surrounding the shopping core. The need for a separate town centre boundary and PSA is not clear. A tighter town centre boundary could be drawn which reflects the existing PSA. The existing PSA area is shown at Figure 6.4. Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach.
- 6.100 Three development allocation were identified in the town centre in the Wycombe Delivery and Site Allocations Plan i.e. MR3 - Riley Road, MR4 – Portlands and MR5 – Liston Road Car Park. The Riley Road allocation has been successfully redeveloped to provide a large Sainsbury's store. The Liston Road Car Park is allocated for residential use. The Portland site is also a residential allocation where only small-scale town centre development will be considered appropriate. There appears to be limited further development potential apart from small scale extensions and redevelopments.



Figure 6.4 Marlow's Primary Shopping Area



Source: Wycombe Local Plan Proposals Map

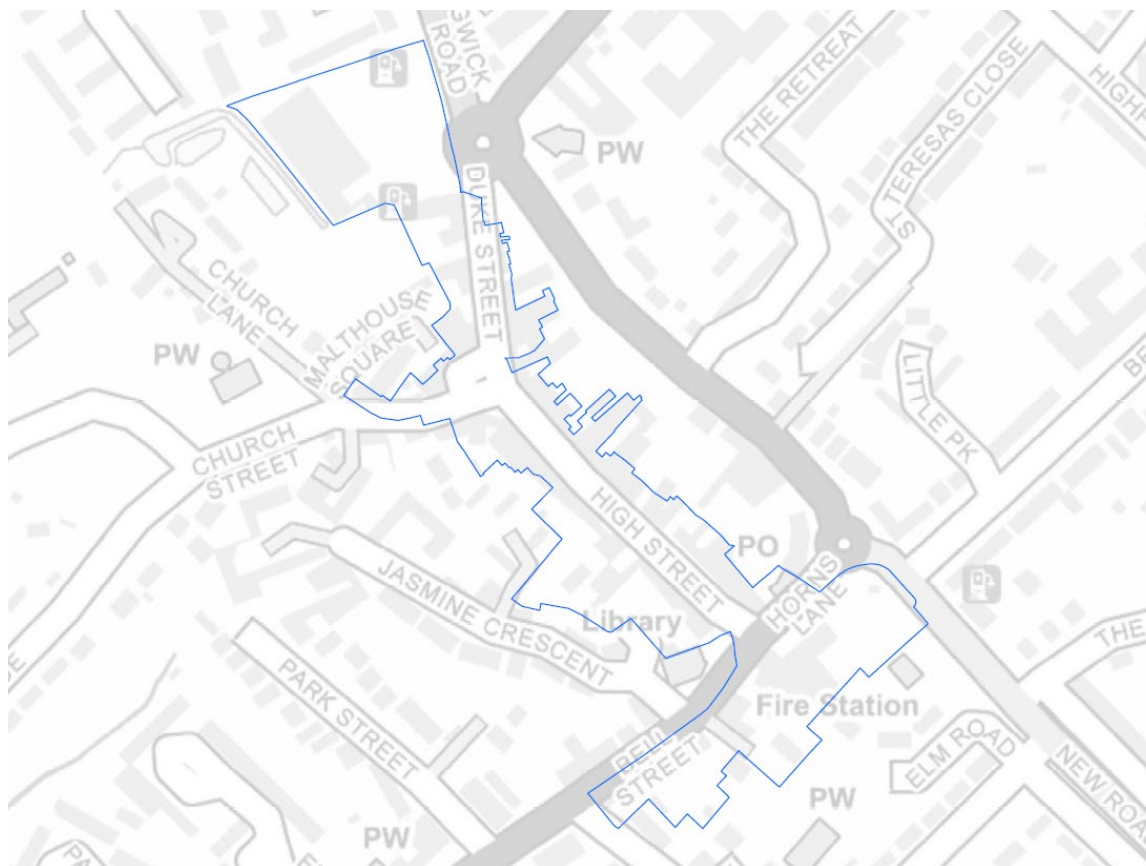
- 6.101 The Marlow town centre health check set out in Appendix 16 indicates the centre is performing relatively well. It benefits from additional tourist visitors. The centre is rated highly for 14 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve adaptability and innovation/experimentation.

### Princes Risborough

- 6.102 Princes Risborough falls within the overlapping sub-regional catchment areas of Aylesbury and High Wycombe. The combined retail, food/beverage and leisure floorspace projection is 1,726 sq.m by 2035 increasing to 2,718 sq.m in 2040 and then to 4,035 sq.m in 2045. Existing vacant floorspace (1,940 sq.m) in Princes Risborough could accommodate some of this floorspace projection. Two development allocation were identified in the town centre in the Wycombe Delivery and Site Allocations Plan i.e. PR13 – land fronting New Road (Back Lane) and PR14 – land south of Horns Lane. PR13 is allocated for small- scale mixed use development predominantly for main town centre uses. PR14 is also allocated for small-scale mixed-use development predominantly for retail and main town centre uses.
- 6.103 The Princes Risborough town centre boundary is widely drawn, including large residential areas to the west of the High Street. The designated PSA is more tightly drawn around the existing commercial uses. As in Marlow, Princes Risborough is a relatively small centre and does not have significant employment or civic areas surrounding the shopping core. The need for a separate town centre boundary and PSA is not clear. A tighter town centre

boundary could be drawn which reflects the existing PSA and development site allocations. The PSA in Princes Risborough is shown at Figure 6.5. Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach.

Figure 6.5 Princes Risborough's Primary Shopping Area



Source: Wycombe Local Plan Proposals Map

- 6.104 The out-of-centre Princes Risborough Expansion allocation areas including over 2,000 dwellings are expected to include a small local centre of between 300 to 400 sq.m. retail/services uses, plus business start-ups and community facilities. When this new local centre is delivered, the new floorspace will need to be subtracted from the Princes Risborough retail, food/beverage and leisure floorspace projections above.
- 6.105 The Princes Risborough town centre health check set out in Appendix 17 indicates the centre is performing satisfactorily. The centre is rated highly for 7 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the adaptability of premises.

### Wendover

- 6.106 Wendover falls within the Aylesbury sub-regional catchment area. The combined retail, food/beverage and leisure floorspace projection for study area Zones 4, 5 and 6 is 14,889 sq.m by 2035 increasing to 23,473 sq.m in 2040 and then to 35,865 sq.m in 2045. Existing vacant floorspace (240 sq.m) in Wendover cannot accommodate a significant amount of this floorspace projection.

- 6.107 The Vale of Aylesbury Adopted Local Plan identifies a relatively tightly drawn town centre boundary. No PSA or shop frontages or development allocations were identified. Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach. Extending the centre boundary is restricted by surrounding residential areas. The development strategy could seek to redistribute residual capacity to Aylesbury, where there is more vacant floorspace and potential development sites.
- 6.108 The Wendover town centre health check set out in Appendix 18 indicates the centre is performing satisfactorily. The centre is rated highly for 7 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the diversity of uses, adaptability, innovation and experimentation.

### **Winslow**

- 6.109 The Buckinghamshire Regeneration Framework identifies Winslow as a smaller market town, with opportunities to provide a retail and commercial hub. The combined retail, food/beverage and leisure floorspace projection for Zone 1 (Buckingham and Winslow) is 2,665 sq.m by 2035 increasing to 4,177 sq.m in 2040 and then to 6,130 sq.m in 2045. Existing vacant floorspace (286 sq.m) in Winslow cannot accommodate the majority of this floorspace projection.
- 6.110 The Vale of Aylesbury Adopted Local Plan and the Neighbourhood Plan identify a relatively tightly drawn town centre boundary. No PSA or shop frontages or development allocations were identified. Future policy should indicate retail and other main town centre uses should be focused in the town centre area, consistent with the sequential approach.
- 6.111 The Former Winslow Centre allocation in the Neighbourhood Plan (policy 9) is out of centre, but the policy suggests a comprehensive mixed-use development could include multi-functional space to include Class E and/or F uses. The expansion of Winslow at Great Horwood Road (at least 315 dwellings) could also accommodate some of the town's floorspace projection, but the scale of local facilities should be commensurate to the new population.
- 6.112 The Winslow town centre health check set out in Appendix 19 indicates the centre is performing satisfactorily. The centre is rated highly for 5 of the Institute of Place Management's 25 vital and viable factors. The future priorities should be to improve the diversity of uses and adaptability.

### **Controlling the mix of uses**

- 6.113 Principle Two of the Buckinghamshire Regeneration Framework seeks to create multi-purpose hubs of activity and experiences in the main towns and high streets, to encourage people to spend more time locally. This is expected to include town centre living, flexible workspaces, attractive and accessible green spaces, markets, entertainment and other leisure attractions. "Succeeding as a Place - Vision for Buckinghamshire to 2050" seeks to create more vibrant, successful and healthy places across Buckinghamshire and to achieve this there is a need to invest in and repurpose towns to diversify the offer and create transformative economic and social centres.

- 6.114 The ability to control the mix of uses within centres and frontages has changed significantly since the previous development plans were adopted. Current and future market trends; the relatively low retail floorspace medium-term capacity projections; and changes to the NPPF and the UCO; indicate a more flexible approach to shop frontage policies and the mix of uses within centres should be considered.
- 6.115 A balanced approach is recommended that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, the floorspace projections suggest there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town and local shopping centres. However, changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 6.116 Considering changes to the UCO and PDR, restrictive policies may be unsound and unimplementable for existing premises. The UCO/PDR changes prevent a more restrictive approach, but the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). A report to Buckinghamshire's Cabinet in November 2021 recognised the widespread use of Class MA has the potential to undermine the vitality and viability of Buckinghamshire's core shopping areas. As a result, further work has been commenced to consider imposing Article 4 directions in these areas. However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E. Article 4 directions to restrict PDR may be most appropriate in centres with a low vacancy rate and high combined retail, food/beverage and leisure floorspace projections i.e. where there is an imbalance between supply and demand.
- 6.117 In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre. Demand from retail and, recently food/beverage, occupiers has reduced and the updated floorspace projections are much lower than those set out in previous studies, particularly comparison goods retail. The continuation of the previous policy approaches could be undermined and hampered by the UCO/PDR changes.
- 6.118 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this is not affected by changes to the Use Classes Order or Permitted Development Rights. Other non-Class E uses at ground floor level can be controlled within the designated frontages, where necessary.
- 6.119 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations. Planning policy could seek to control the mix of uses within Class E for new

development where planning conditions can be introduced restricting movement within the use class.

- 6.120 The policy approaches adopted in current Local and Neighbourhood Plans vary significantly. In Aylesbury, High Wycombe, Marlow and Princes Risborough there are four separate Proposal Map designations i.e. town centre boundaries, PSA and Primary and Secondary Shopping Frontages. In the Wycombe Delivery and Site Allocations Plan the town centre boundaries and PSA areas are used to apply the sequential approach. Policies relating to Primary and Secondary Shopping Frontages seek to control the mix of uses and retain active frontages and a complicated approach is adopted imposing minimum frontage lengths that should be retained in the former Class A1 retail uses. This approach is no longer sound or enforceable due to the UCO changes outlined above. Likewise, policies in the Buckingham Neighbourhood Plan (2015), the Chiltern District Local Plan (consolidated 2007 & 2011) and South Bucks District (consolidated 2007 & 2011), seeking to control the amount of non-retail frontages in the defined shopping frontages, are no longer sound or enforceable.
- 6.121 The Winslow Neighbourhood Plan (Policy 10) seeks to ensure the maximum retention of existing retail premises but does not indicate how this will be achieved with the changes to the UCO and PDR.
- 6.122 The Vale of Aylesbury Local Plan post-dates the UCO changes and adopts a more sound and enforceable policy approach. Policy E6 permits Class E(a), E(b) and E(c) uses in the Primary Shopping Frontages in Aylesbury and Buckingham, which is effectively all retail and services uses previously in Use Classes A1, A2 and A3. Whilst this policy can restrict developments proposing other Class E uses e.g. leisure, medical and office uses, it would not prevent movement within Class E, i.e. changes of use that do not require planning permission. One criterion in Policy E6 in the adopted plan (incorrectly) still refers to development that would not result in the loss of Class A1 use in a visibly prominent site. Class A1 no longer exists so future policy should refer to the Class E categories.
- 6.123 Policy E6 allows Class E(a), E(b) and E(c) uses and any other main town centre uses in the secondary shopping frontages. Developments resulting in the loss of Class E(a) on a visibly prominent site will be resisted, or where it would result in the concentration of three non-Class E(a) uses. Again, this part of Policy E6 can only control developments proposing other Class E uses. It cannot control movement within Class E. Policy E6 permits non-town uses outside the primary and secondary frontages subject to similar criteria.
- 6.124 Future planning policies could continue to designate PSA's within the sub-regional centres in Aylesbury and High Wycombe to manage the mix of uses and protect the vitality and viability of the centre. The designation of primary and secondary frontages, in addition to a PSA, could be considered in line with the policy approach in the Vale of Aylesbury Local Plan. Within PSAs the retail offer could still be protected and uses within Class E could be retained whilst maintaining an active frontage. Within other parts of the town centres, a wider range of main town centre uses including Class E, Sui Generis and Class F could be protected. This is essentially the approach adopted in the Vale of Aylesbury Local Plan.
- 6.125 Within the other centres it is not necessary to define a PSA within the town centre boundary. The existing designation of primary and secondary shopping frontages within other town centres is not consistent. Beaconsfield New Town, Buckingham, Gerrards Cross,

Marlow and Princes Risborough have designated primary and secondary frontages, but there are no designated frontages in Amersham on the Hill, Amersham Old Town, Wendover and Winslow, and Chesham only has Principal Shopping Frontages.

- 6.126 In our view, Primary Frontages should be identified in the proposed Sub-Regional and Town Centres, but not District and Local Centres. These Primary Frontages should be consistent with the current Proposals Map designations in Beaconsfield New Town, Buckingham, Chesham, Gerrards Cross, Marlow and Princes Risborough. Primary Frontage should be designated in Amersham on the Hill along Sycamore Road and Hill Avenue. The policy approach within these Primary Shopping Frontages could be consistent with the approach adopted in the Vale of Aylesbury Local Plan Policy E6 for Aylesbury and Buckingham. Outside of the Primary Shopping Frontages but within the Town Centre Boundary, it is not necessary to identify secondary shopping frontage, but the policy approach in this area should adopt Policy E6's approach for Secondary Shopping Frontages in Aylesbury.
- 6.127 Within District and Local Centres it is only necessary to define centre boundaries. Within these boundaries, main town centre uses should be protected adopting a similar approach to Policy E6 for Secondary Shopping Frontages in Aylesbury.

## 7.0

## Conclusions

## 7.1

This section draws together the analysis set out in previous sections and provides strategic recommendations for Buckinghamshire. It explores how the identified growth and change across Buckinghamshire could be accommodated and the future role of the town centres.

### Meeting Buckinghamshire's needs

## 7.2

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 retail 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. The combined floorspace projections for retail, food/beverage and commercial leisure/ entertainment/cultural floorspace in 2035, 2040 and 2045 are summarised and rounded in Tables 7.1 and 7.2. The projections assume an even spread of population growth across the study area zones based on existing penetration rates (or market shares). The precise distribution of floorspace requirements will be dictated by the Council's chosen spatial strategy for housing growth.

Table 7.1 Combined retail, food/beverage, leisure and cultural floorspace requirements (sq.m gross) - cumulative

Time period	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food /beverage (sq.m gross)	Leisure /cultural (sq.m gross)	Total (sq.m gross)
By 2035	9,798	20,612	17,033	11,767	<b>59,210</b>
By 2040	15,869	32,580	26,321	18,186	<b>92,956</b>
By 2045	24,071	54,315	36,700	25,356	<b>140,442</b>

Table 7.2 Combined floorspace requirements by location (sq.m gross) - cumulative

Zone / Area	By 2035	By 2040	By 2045
1/2 – Buckingham / Winslow	2,665	4,177	6,130
4/5/6 Aylesbury /Wendover	14,889	23,473	35,865
8 - Princes Risborough	1,726	2,718	4,035
9 – Marlow	5,123	7,974	11,528
10/11 - High Wycombe/Hazlemere	19,769	31,078	48,225
12 – Chesham	2,746	4,300	6,403
12 – Great Missenden	607	949	1,388
13 - Amersham/Chalfonts	5,280	8,259	12,138
14 – Beaconsfield / Gerrards Cross	5,567	8,719	12,760
15 – Denham/Iver	836	1,309	1,968
<b>Total</b>	<b>59,210</b>	<b>92,956</b>	<b>140,442</b>

## 7.3

As with most economic projections currently, long-term floorspace capacity forecasts beyond 2035 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long-term projections must be treated with caution and kept under review.

- 7.4 The combined total projection to 2035 is 59,210 sq.m gross which is higher than the current amount of vacant shop floorspace in the 14 designated centres (about 42,800 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate about a quarter of the projected need up to 2035.
- 7.5 The capacity projections in this update suggest there is a requirement to allocate sites for retail or leisure development to accommodate projected growth for the first ten years of the plan period through to 2035. The priority in the short-term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.
- 7.6 All the residual need for development is unlikely to be accommodated within the town centre boundaries. However, most (about 85%) of the projected capacity for new floorspace relates to population growth rather than growth in expenditure from the existing population. Major housing developments, potentially including urban extensions and/or new settlements, are like to be required to meet the standard method housing figures. A significant element of the residual retail, food/beverage and leisure floorspace capacity is likely to be accommodated within these large residential developments in the form of new town, district or local centres. Future allocations (and subsequent masterplans and/ or outline applications) would need to assess the specific need for a mix of retail, food/ beverage and leisure floorspace as well as the potential for the catchment population to utilise existing centres, depending on the respective locations of new major housing sites.
- 7.7 Future planning policy should seek to ensure new developments are flexible. The design and configuration of buildings should allow for the merger and sub-division of units, offering maximum flexibility to respond to changing operator requirements over the plan period.
- 7.8 Residents in Buckinghamshire have excellent access to a range of commercial leisure and entertainment facilities within Buckinghamshire and in the surrounding areas. Facilities in Milton Keynes, Maidenhead, Oxford, Reading, Slough and Central London are accessible. Most of the key sectors are represented in Buckinghamshire e.g. cinemas, theatres, gyms, tenpin bowling and museums/galleries. The expenditure projections indicate there may be potential to accommodate an additional 25,400 sq.m gross of commercial leisure and cultural floorspace, which could include:
- 10 large or 20 medium sized health and fitness facilities (about 1,070 new fitness stations);
  - new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
  - small scale tourist attractions/cultural facilities.
- 7.9 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.
- 7.10 The Employment Land Review suggests new office floorspace will be required, some of which could be accommodated in town centres, primarily High Wycombe and Aylesbury town centres. This suggests mixed use developments including offices and other main town



centre uses could be promoted, over and above the reoccupation of existing vacant premises.

## **Future planning policy**

### **Hierarchy of centres**

- 7.11 Identifying the hierarchy of centres and the boundaries of centres in the new Local Plan is important in terms of:
- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
  - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
  - identifying a viable role and strategy for each centre.
- 7.12 Aylesbury and High Wycombe should be designated as Sub-regional Town Centres at the top of the hierarchy of centres, which will be the focus for retail development in Buckinghamshire serving communities within the northern and southern halves of the authority area. The network of town, district and local centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.
- 7.13 Other town, district and local centres play an important role as a focal point in their respective settlements/community areas, but do not offer the same range and choice of facilities available within Aylesbury and High Wycombe. All these centres should continue to be protected because they help to ensure all residents have access to local facilities within walking distance.
- 7.14 The capacity projections indicate there is no need to designate out-of-centre retail parks as centres, where new main town centre uses should be focused. Applications for new floorspace including extensions, changes of use and the removal of restrictive planning conditions should still be required to comply with the sequential and impact tests.

### **Impact and sequential tests**

- 7.15 Future Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. Retail and leisure development outside of the designated centre boundaries should comply with the sequential and impact tests. All other main town centre uses as defined in the NPPF glossary should comply with the sequential test.
- 7.16 The NPPF minimum threshold of 2,500 sq.m gross is an inappropriate threshold for all centres in Buckinghamshire because this scale of development would exceed the overall long-term retail/food beverage/leisure projections across Buckinghamshire. The lower retail capacity projections, relatively high vacancy rates in some centres and uncertainties about the post-Covid recovery and cost of living crisis suggest town centres are now more vulnerable to out-of-centre developments.

- 7.17 Given the overlapping nature of catchment areas in Buckinghamshire, a consistent impact threshold could be applied across the authority area. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated town and local centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations.
- 7.18 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. A minimum floorspace sequential test threshold of 400 sq.m gross should be considered for main town centre uses outside of the main settlements, i.e. where facilities may be needed to serve local needs.
- 7.19 All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow local facilities to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

### **Town and local centre boundaries**

- 7.20 Development plan should define clear boundaries for town, district and local shopping centres on the Proposals Map, which is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required.
- 7.21 The retail floorspace capacity projections and the high number of vacant units in centres suggest there is no need to significantly extend or contract centre boundaries to accommodate future growth. The minor contraction of some centre boundaries could be considered where there is a concentration of non-town centre uses or vacant shop units.
- 7.22 For consistency centre boundaries should be identified for all centres. Boundary adjustments could be considered in Aylesbury, Buckingham, Gerrards Cross, Marlow, and Princes Risborough.

### **Controlling the mix of uses**

- 7.23 A balanced policy approach is recommended that recognises the need to maintain and enhance each centre’s retail role, as well as introducing new non-retail uses. There is still a need to retain and encourage new retail uses within the town, district and local centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 7.24 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights. Other non-Class E uses at ground floor level can be controlled within the designated frontages.

- 7.25 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.
- 7.26 The new Local Plan could continue to designate Primary Shopping Areas (PSA) within Aylesbury and High Wycombe to manage the mix of uses and protect the vitality and viability of the centre. The designation of a PSA in other smaller centres is unnecessary.
- 7.27 The existing designation of primary and secondary shopping frontages is not consistent. In the new Local Plan Primary Shopping Frontages could be identified in the proposed Town Centres (Aylesbury, Chesham, High Wycombe). These Primary Shopping Frontages should be consistent with the current Proposals Map designations. The policy approach within these Primary Shopping Frontages could be consistent with the approach adopted in the Vale of Aylesbury Local Plan Policy E6 for Aylesbury and Buckingham. Outside of the Primary Shopping Frontages but within the Town Centre Boundary, the policy approach could adopt Policy E6's approach for Secondary Shopping Frontages in Aylesbury.
- 7.28 Within District and Local Centres the designation of centre boundaries only should be sufficient. Within these boundaries, main town centre uses should be protected adopting a similar approach to Policy E6 for Secondary Shopping Frontages in Aylesbury.
- 7.29 Within Primary Shopping Frontages in Sub-Regional and Town Centre, the retail offer could still be protected and uses within Class E could be retained whilst maintaining an active frontage. Within other parts of the Sub-Regional and Town Centre, and in District and Local Centres, a wider range of main town centre uses including Class E, Sui Generis and Class F should be protected and promoted, but it is not necessary to designate Secondary Shopping Frontages in this area.

### **Future monitoring**

- 7.30 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium and long-term to 2045. Longer-term projections up to 2045 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the cost-of-living crisis that will need to be monitored. Longer-term projections after 2035 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:
- population projections;
  - local expenditure estimates (information from Experian or other recognised providers);
  - growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
  - the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);

- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

7.31 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections.