Buckinghamshire Employment and Retail Evidence

Part B Retail Evidence Study - Volume 2 - Appendices

Final Report

Buckinghamshire Council

14 July 2025

LICHFIELDS

65825/02/CGJ/SPz
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Contents

Appendix 1 Study area

Study area zones

Zone	Ward code	Ward name
1	E05013132 E05013133 E05013168	Buckingham East Buckingham West Winslow
2	E05013146 E05013151 E05013167	Great Brickhill Ivinghoe Wing
3	E05004711 E05004712 E05004713 E05004693	Tring Central Tring East Tring West and Rural Aldbury and Wigginton
4	E05013123 E05013165 E05013122	Aylesbury East Wendover, Halton and Stoke Mandeville Aston Clinton and Bierton
5	E05013124 E05013125 E05013126 E05013127 E05013128	Aylesbury North Aylesbury North West Aylesbury South East Aylesbury South West Aylesbury West
6	E05013148 E05013130 E05013159	Grendon Underwood Bernwood Stone and Waddesdon
7	E05009736 E05009749 E05009751 E05011705	Chinnor Thame Watlington Haseley Brook
8	E05013155 E05013161 E05013156	Ridgeway East The Risboroughs Ridgeway West
9	E05012496 E05013139 E05013144 E05013153 E05013162	Bisham & Cookham Chiltern Villages Flackwell Heath, Little Marlow/Marlow South East Marlow The Wooburns, Bourne End and Hedsor
10	E05013120 E05013166 E05013131 E05013142 E05013160	Abbey West Wycombe Booker, Cressex and Castlefield Downley Terriers and Amersham Hill
11	E05013149 E05013164 E05013157 E05013163	Hazlemere Tylers Green and Loudwater Ryemead and Micklefield Totteridge and Bowerdean

Zone	Ward code	Ward name
12	E05013136	Chesham
	E05013137	Chess Valley
	E05013138	Chiltern Ridges
	E05013147	Great Missenden
	E05004700	Bovingdon, Flaunden and Chipperfield
13	E05013121	Amersham and Chesham Bois
	E05013152	Little Chalfont and Amersham Common
	E05013134	Chalfont St Giles
	E05013135	Chalfont St Peter
	E05009428	Chorleywood South & Maple Cross
	E05013154	Penn Wood and Old Amersham
14	E05013140	Cliveden
	E05013143	Farnham Common and Burnham Beeches
	E05013129	Beaconsfield
	E05013145	Gerrards Cross
15	E05013141	Denham
	E05013150	Iver
	E05013158	Stoke Poges and Wexham
	E05000330	Harefield

Key

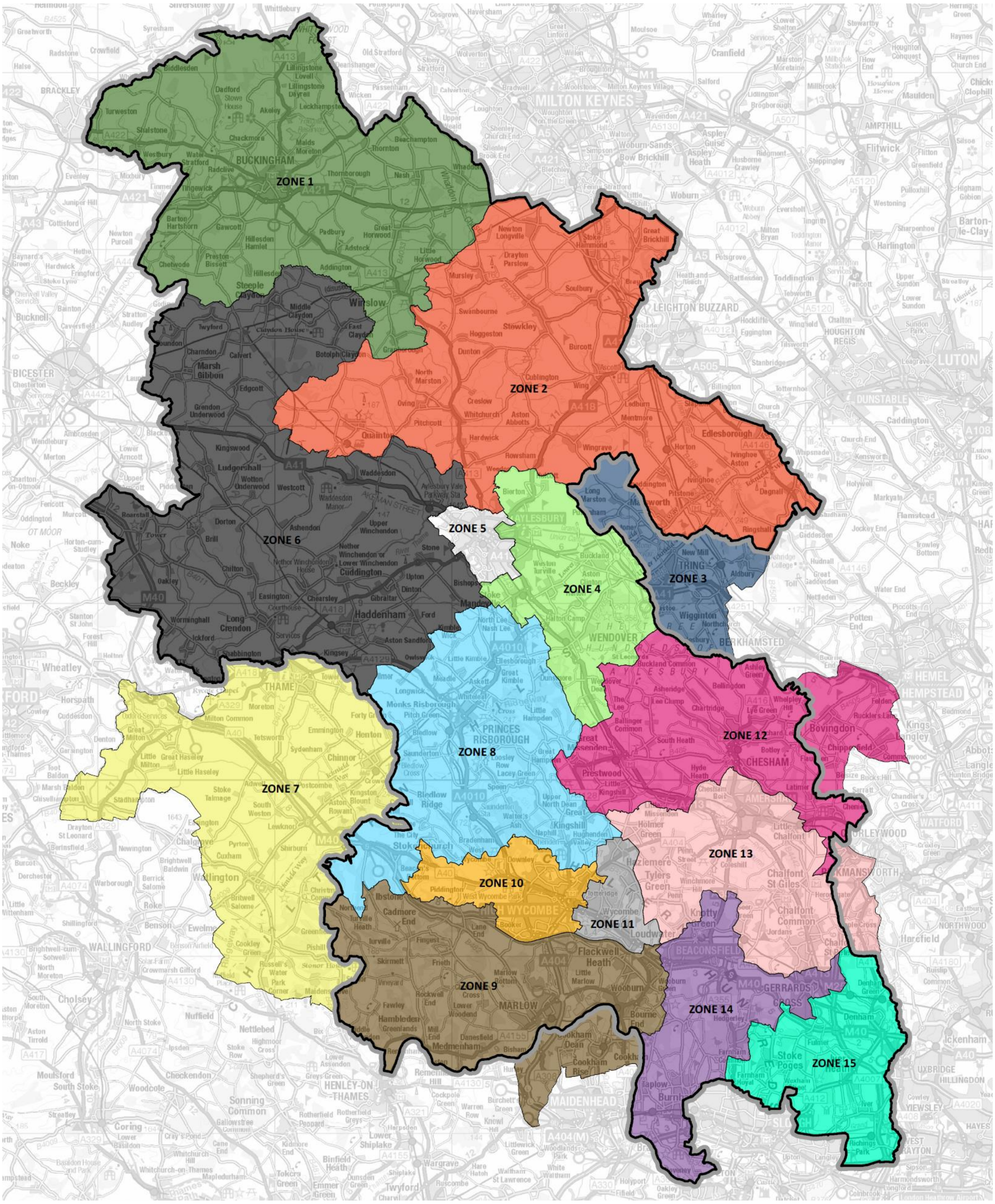
Buckinghamshire Local Authority Boundary

Zone

Zone 1 Zone 4 Zone 7 Zone 10 Zone 13

Zone 2 Zone 5 Zone 8 Zone 11 Zone 14

Zone 3 Zone 6 Zone 9 Zone 12 Zone 15


ZONE 1
ZONE 2
ZONE 3
ZONE 4
ZONE 5
ZONE 6
ZONE 7
ZONE 8
ZONE 9
ZONE 10
ZONE 11
ZONE 12
ZONE 13
ZONE 14
ZONE 15
MILTON KEYNES
BUCKINGHAM
LEIGHTON BUZZARD
LUTON
DUNSTABLE
BICESTER
TRING
WENDOVER
CHESHAM
PRINCES RISBOROUGH
THAME
WALLINGFORD
MARLOW
MAIDENHEAD
HENLEY-ON-THAMES
Haddenham
BERKHAMSTED
WATFORD

Appendix 2 Convenience goods capacity

Table 1 - Study area population projections

Zone	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	34,473	36,659	38,358	40,204	42,250
2 - Buckinghamshire rural northeast	36,644	38,968	40,773	42,736	44,910
3 - Tring	16,973	17,219	17,363	17,502	17,658
4 - Aylesbury southeast/Wendover	40,195	42,744	44,724	46,877	49,262
5 - Aylesbury urban	61,526	65,428	68,459	71,754	75,405
6 - Buckingham rural northwest	41,003	43,603	45,623	47,819	50,253
7 - Thame/Chinnor	31,449	31,860	32,130	32,524	32,883
8 - Princes Risborough	31,905	33,928	35,500	37,209	39,102
9 - Marlow	52,437	55,762	58,346	61,154	64,266
10 - High Wycombe west	60,894	64,756	67,756	71,017	74,631
11 - High Wycombe east	43,944	46,731	48,896	51,249	53,857
12 - Chesham/Great Missenden	52,203	55,514	58,086	60,881	63,979
13 - Amersham/Chalfonts	63,067	67,067	70,174	73,551	77,294
14 - Beaconsfield/Gerrards Cross	41,076	43,681	45,705	47,904	50,342
15 - Denham/Iver	31,660	33,668	35,228	36,923	38,802
Total	**639,449**	**677,588**	**707,120**	**739,305**	**774,894**

Sources:
Local Housing Need of 4,490 dpa using the latest standard method calculation assuming backlog demand
Experian population projections (March 2025) for Zones 3 and 7 outside Buckinghamshire

Table 2 - Convenience goods expenditure per person per annum (£)

	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	2,978	2,874	2,825	2,776	2,748
2 - Buckinghamshire rural northeast	2,983	2,879	2,829	2,780	2,752
3 - Tring	3,052	2,945	2,894	2,844	2,816
4 - Aylesbury southeast/Wendover	2,828	2,729	2,682	2,636	2,609
5 - Aylesbury urban	2,612	2,521	2,477	2,434	2,410
6 - Buckingham rural northwest	2,868	2,768	2,720	2,673	2,646
7 - Thame/Chinnor	3,016	2,910	2,860	2,810	2,782
8 - Princes Risborough	3,106	2,997	2,946	2,895	2,866
9 - Marlow	3,200	3,088	3,035	2,982	2,953
10 - High Wycombe west	2,474	2,388	2,346	2,306	2,283
11 - High Wycombe east	2,725	2,630	2,584	2,539	2,514
12 - Chesham/Great Missenden	3,065	2,958	2,907	2,856	2,828
13 - Amersham/Chalfonts	3,240	3,127	3,073	3,020	2,989
14 - Beaconsfield/Gerrards Cross	3,255	3,141	3,087	3,033	3,003
15 - Denham/Iver	2,971	2,867	2,818	2,769	2,741

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 22 (March 2025)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

	2024	2030	2035	2040	2041
1 - Buckingham/Winslow	102.67	105.37	108.35	111.59	116.10
2 - Buckinghamshire rural northeast	109.31	112.18	115.35	118.80	123.60
3 - Tring	51.80	50.72	50.26	49.78	49.72
4 - Aylesbury southeast/Wendover	113.69	116.67	119.97	123.55	128.55
5 - Aylesbury urban	160.72	164.93	169.59	174.67	181.73
6 - Buckingham rural northwest	117.61	120.70	124.11	127.82	132.99
7 - Thame/Chinnor	94.84	92.72	91.89	91.40	91.49
8 - Princes Risborough	99.10	101.70	104.57	107.70	112.05
9 - Marlow	167.81	172.21	177.08	182.38	189.75
10 - High Wycombe west	150.67	154.62	158.99	163.74	170.36
11 - High Wycombe east	119.74	122.89	126.36	130.14	135.40
12 - Chesham/Great Missenden	160.01	164.20	168.84	173.89	180.92
13 - Amersham/Chalfonts	204.35	209.71	215.64	222.09	231.07
14 - Beaconsfield/Gerrards Cross	133.71	137.22	141.10	145.32	151.19
15 - Denham/Iver	94.06	96.53	99.26	102.22	106.36
Total	**1,880.10**	**1,922.36**	**1,971.35**	**2,025.10**	**2,101.28**

Source: Tables 1 and 2

Table 4 - Base year convenience goods market shares by zone (%)

Zone / Destination	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1 - Buckingham	62.4%	4.4%	0.0%	0.5%	0.1%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
1 - Winslow	14.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 1	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Bucks north east	0.0%	5.5%	1.4%	0.0%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4 - Wendover	0.0%	0.0%	0.0%	11.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Other Zone 4	0.0%	0.0%	0.0%	0.9%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4/5 - Aylesbury	1.7%	23.2%	20.4%	68.5%	92.0%	40.1%	12.0%	2.8%	0.0%	1.2%	0.7%	1.5%	0.0%	0.6%	0.5%
Zone 6 - Haddenham	0.0%	1.1%	0.0%	0.5%	0.9%	6.6%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 6	0.0%	0.0%	0.2%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8 - Princes Risborough	0.0%	0.0%	0.0%	0.6%	0.0%	0.2%	6.7%	44.0%	0.0%	0.8%	0.0%	0.2%	0.0%	0.0%	0.0%
Other Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.7%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
9 - Marlow	0.0%	0.6%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	27.9%	0.8%	0.4%	0.3%	0.0%	1.9%	0.0%
9 - Bourne End	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
9 - Flackwell Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	1.2%	0.3%	0.0%	0.9%	0.0%
Other Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	3.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
10/11 - High Wycombe	2.9%	9.3%	0.0%	1.9%	2.3%	0.0%	0.8%	27.9%	37.9%	90.9%	74.4%	11.2%	9.1%	11.1%	4.6%
11 - Hazlemere	1.3%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	4.6%	2.4%	0.2%	9.4%	1.2%	3.4%	1.0%	1.1%
12 - Chesham	0.0%	0.9%	0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	41.9%	2.8%	0.0%	0.0%
12 - Great Missenden / Prestwood	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	10.2%	0.0%	0.0%	0.0%
Other Zone 12	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
13 - Amersham on the Hill	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.7%	12.9%	0.6%	0.0%
13 - Amersham Old Town	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.3%	0.1%	5.9%	14.2%	22.0%	1.3%	1.6%
13 - Chalfont St Giles	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%
13 - Chalfont St Peter	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	1.4%	0.4%
Other Zone 13	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.6%	3.5%	0.0%	0.0%
14 - Beaconsfield New Town	0.0%	1.0%	0.0%	0.3%	0.0%	0.0%	0.0%	1.4%	5.9%	1.9%	6.9%	0.6%	16.0%	23.8%	1.9%
14 - Beaconsfield Old Town	0.0%	1.6%	0.0%	0.0%	0.3%	3.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.1%	0.3%	0.9%
14 - Gerrards Cross	0.8%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%	1.1%	7.7%	15.9%	15.7%
14 - Burnham/Taplow	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	21.7%	1.5%
Other Zone 14	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	2.0%
15 - Denham	0.0%	0.0%	0.0%	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	4.2%
15 - Iver	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.5%
Other Zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%
Buckinghamshire total	**84.2%**	**51.9%**	**22.4%**	**87.0%**	**98.0%**	**64.1%**	**20.6%**	**91.3%**	**91.9%**	**98.2%**	**99.9%**	**86.9%**	**89.1%**	**85.5%**	**49.1%**
Outside Buckinghamshire															
Berkhamsted	0.0%	0.7%	6.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Bicester	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hemel Hempstead	0.0%	0.0%	2.3%	0.9%	0.4%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	6.9%	0.4%	0.0%	0.0%
Henley-on-Thames	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%	1.5%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Leighton Buzzard	0.0%	16.0%	8.2%	0.7%	0.1%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Maidenhead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%
Milton Keynes/Bletchley	13.3%	17.3%	0.8%	2.0%	0.2%	1.5%	1.3%	0.0%	1.8%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Oxford	0.6%	0.7%	0.0%	1.6%	0.0%	7.7%	14.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rickmansworth	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.1%	0.0%	2.4%
Slough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.3%	9.0%	25.6%
Thame/Chinnor	0.0%	0.0%	0.0%	0.8%	0.5%	18.9%	49.4%	4.6%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.6%
Tring	0.0%	9.8%	58.3%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Uxbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.4%	0.0%	12.4%
Watford	0.8%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.4%	2.1%	0.5%	0.0%
Elsewhere	1.1%	3.5%	1.4%	0.9%	0.4%	3.0%	13.4%	2.4%	1.8%	0.0%	0.1%	2.6%	2.4%	2.3%	9.9%
Outside sub-total	**15.8%**	**48.1%**	**77.6%**	**13.0%**	**2.0%**	**35.9%**	**79.4%**	**8.7%**	**8.1%**	**1.8%**	**0.1%**	**13.1%**	**10.9%**	**14.5%**	**50.9%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey February 2023 and Lichfields' analysis.

Table 5 - Base year 2024 convenience goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2024	102.67	109.31	51.80	113.69	160.72	117.61	94.84	99.10	167.81	150.67	119.74	160.01	204.35	133.71	94.06	1,880.10
1 - Buckingham	64.06	4.85	0.00	0.59	0.15	7.17	0.00	0.00	0.00	0.00	0.00	0.00	1.19	0.00	0.00	78.02
1 - Winslow	14.47	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.67
Other Zone 1	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.37
Zone 2 - Bucks north east	0.00	6.00	0.72	0.00	0.41	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.42
4 - Wendover	0.00	0.00	0.00	12.55	1.58	0.00	0.00	0.00	0.00	0.00	0.00	0.45	0.00	0.00	0.00	14.58
Other Zone 4	0.00	0.00	0.00	1.02	0.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.47
4/5 - Aylesbury	1.74	25.31	10.55	77.93	147.92	47.14	11.36	2.74	0.00	1.85	0.80	2.40	0.00	0.76	0.47	330.97
Zone 6 - Haddenham	0.00	1.25	0.00	0.59	1.51	7.74	1.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.25
Other Zone 6	0.00	0.00	0.13	0.00	0.00	9.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.42
8 - Princes Risborough	0.00	0.00	0.00	0.73	0.00	0.24	6.35	43.62	0.00	1.21	0.00	0.31	0.00	0.00	0.00	52.46
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.82	1.20	1.50	0.00	0.00	0.00	0.00	0.00	11.52
9 - Marlow	0.00	0.63	0.00	1.09	0.00	0.00	0.00	0.00	46.83	1.22	0.45	0.53	0.00	2.57	0.00	53.32
9 - Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.07	0.00	0.00	0.00	0.00	0.00	0.00	9.07
9 - Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.88	0.00	1.44	0.53	0.00	1.20	0.00	10.05
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.32	5.10	0.96	0.00	0.00	0.00	0.00	0.00	6.39
10/11 - High Wycombe	3.02	10.13	0.00	2.17	3.77	0.00	0.71	27.66	63.52	137.02	89.08	17.96	18.69	14.80	4.28	392.82
11 - Hazlemere	1.37	0.00	0.00	0.19	0.00	0.00	0.00	4.57	4.00	0.26	11.28	1.92	6.92	1.36	1.06	32.91
12 - Chesham	0.00	0.94	0.23	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	67.12	5.76	0.00	0.00	74.36
12 - Great Missenden / Prestwood	0.00	1.88	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	16.34	0.00	0.00	0.00	18.38
Other Zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.87	0.00	0.00	0.00	0.87
13 - Amersham on the Hill	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	4.29	26.28	0.76	0.00	32.61
13 - Amersham Old Town	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.23	2.26	0.14	7.08	22.64	45.04	1.79	1.52	81.71
13 - Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.36	0.00	0.00	8.36
13 - Chalfont St Peter	0.00	0.00	0.00	1.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.21	1.88	0.40	17.59
Other Zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.37	0.00	0.00	1.02	7.14	0.00	0.00	9.53
14 - Beaconsfield New Town	0.00	1.11	0.00	0.32	0.00	0.00	0.00	1.34	9.83	2.94	8.31	0.96	32.60	31.89	1.75	91.04
14 - Beaconsfield Old Town	0.00	1.74	0.00	0.00	0.45	3.58	0.00	0.00	0.00	0.78	0.00	0.00	0.21	0.42	0.84	8.04
14 - Gerrards Cross	0.86	2.24	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.00	0.51	1.73	15.75	21.23	14.81	57.71
14 - Burnham/Taplow	0.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.57	0.00	0.00	0.00	0.00	29.05	1.39	34.55
Other Zone 14	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.33	1.92	8.39
15 - Denham	0.00	0.00	0.00	0.15	1.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.22	3.96	5.43
15 - Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.93	8.93
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.86	4.86
Bucks sub-total	**86.44**	**56.73**	**11.63**	**98.88**	**157.54**	**75.44**	**19.58**	**90.47**	**154.21**	**147.89**	**119.60**	**139.08**	**182.15**	**114.27**	**46.19**	**1,500.09**
Outside Bucks																
Berkhamsted	0.00	0.80	3.39	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	6.35
Bicester	0.00	0.00	0.00	0.00	0.00	5.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.54
Hemel Hempstead	0.00	0.00	1.17	0.97	0.68	0.00	0.00	0.50	0.00	0.00	0.00	10.98	0.90	0.00	0.00	15.21
Henley-on-Thames	0.00	0.00	0.00	0.00	0.00	0.00	0.66	0.14	2.45	0.78	0.00	0.00	0.00	0.00	0.00	4.04
Leighton Buzzard	0.00	17.52	4.25	0.79	0.15	0.00	0.00	1.07	0.00	0.00	0.00	0.17	0.00	0.00	0.00	23.94
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.96	0.00	0.00	0.00	0.00	3.68	0.00	7.63
Milton Keynes/Bletchley	13.66	18.94	0.40	2.32	0.28	1.78	1.20	0.00	2.94	0.00	0.00	1.08	0.00	0.00	0.00	42.59
Oxford	0.58	0.73	0.00	1.85	0.00	9.04	13.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.08
Rickmansworth	0.00	0.00	0.00	0.00	0.60	0.00	0.00	0.00	0.00	0.00	0.00	0.39	10.48	0.00	2.24	13.71
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.65	12.01	24.10	37.97
Thame/Chinnor	0.00	0.00	0.00	0.87	0.87	22.27	46.83	4.52	0.00	0.53	0.00	0.00	0.00	0.00	0.58	76.46
Tring	0.00	10.77	30.22	6.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.48	0.00	0.00	0.00	48.79
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.44	0.00	0.00	0.90	0.00	11.64	12.97
Watford	0.86	0.00	0.00	0.53	0.00	0.00	0.00	0.00	0.00	1.03	0.00	0.61	4.27	0.63	0.00	7.93
Elsewhere	1.14	3.83	0.75	0.99	0.60	3.53	12.69	2.40	3.05	0.00	0.15	4.22	5.00	3.12	9.32	50.78
Outside Bucks sub-total	**16.24**	**52.59**	**40.18**	**14.80**	**3.17**	**42.17**	**75.26**	**8.63**	**13.60**	**2.78**	**0.15**	**20.93**	**22.21**	**19.44**	**47.87**	**380.01**
TOTAL	**102.67**	**109.31**	**51.80**	**113.69**	**160.72**	**117.61**	**94.84**	**99.10**	**167.81**	**150.67**	**119.74**	**160.01**	**204.35**	**133.71**	**94.06**	**1,880.10**

Source: Table 3 and Table 4

Table 6 - Future 2030 convenience goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2030	105.37	112.18	50.72	116.67	164.93	120.70	92.72	101.70	172.21	154.62	122.89	164.20	209.71	137.22	96.53	1,922.36
1 - Buckingham	65.74	4.98	0.00	0.61	0.15	7.36	0.00	0.00	0.00	0.00	0.00	0.00	1.22	0.00	0.00	80.06
1 - Winslow	14.85	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.05
Other Zone 1	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38
Zone 2 - Bucks north east	0.00	6.16	0.71	0.00	0.42	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.58
4 - Wendover	0.00	0.00	0.00	12.87	1.63	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.00	14.96
Other Zone 4	0.00	0.00	0.00	1.04	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.51
4/5 - Aylesbury	1.78	25.98	10.33	79.97	151.80	48.38	11.10	2.81	0.00	1.90	0.82	2.46	0.00	0.78	0.48	338.61
Zone 6 - Haddenham	0.00	1.28	0.00	0.61	1.55	7.95	1.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.51
Other Zone 6	0.00	0.00	0.13	0.00	0.00	9.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.66
8 - Princes Risborough	0.00	0.00	0.00	0.75	0.00	0.25	6.21	44.76	0.00	1.24	0.00	0.32	0.00	0.00	0.00	53.53
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.05	1.23	1.54	0.00	0.00	0.00	0.00	0.00	11.82
9 - Marlow	0.00	0.65	0.00	1.12	0.00	0.00	0.00	0.00	48.06	1.25	0.46	0.55	0.00	2.63	0.00	54.72
9 - Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.31	0.00	0.00	0.00	0.00	0.00	0.00	9.31
9 - Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.06	0.00	1.48	0.55	0.00	1.23	0.00	10.32
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.33	5.23	0.99	0.00	0.00	0.00	0.00	0.00	6.56
10/11 - High Wycombe	3.10	10.40	0.00	2.22	3.87	0.00	0.70	28.39	65.19	140.61	91.42	18.44	19.18	15.19	4.39	403.09
11 - Hazlemere	1.40	0.00	0.00	0.20	0.00	0.00	0.00	4.69	4.10	0.26	11.57	1.97	7.10	1.39	1.08	33.78
12 - Chesham	0.00	0.96	0.22	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	68.88	5.91	0.00	0.00	76.30
12 - Great Missenden / Prestwood	0.00	1.93	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	16.76	0.00	0.00	0.00	18.86
Other Zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90	0.00	0.00	0.00	0.90
13 - Amersham on the Hill	0.00	0.65	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.66	4.41	26.96	0.78	0.00	33.47
13 - Amersham Old Town	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	2.32	0.15	7.27	23.23	46.22	1.84	1.56	83.85
13 - Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.58	0.00	0.00	8.58
13 - Chalfont St Peter	0.00	0.00	0.00	1.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.59	1.93	0.41	18.05
Other Zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.40	0.00	0.00	1.05	7.33	0.00	0.00	9.78
14 - Beaconsfield New Town	0.00	1.14	0.00	0.33	0.00	0.00	0.00	1.37	10.08	3.01	8.53	0.99	33.46	32.72	1.80	93.43
14 - Beaconsfield Old Town	0.00	1.79	0.00	0.00	0.47	3.67	0.00	0.00	0.00	0.80	0.00	0.00	0.22	0.44	0.86	8.25
14 - Gerrards Cross	0.89	2.30	0.00	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.53	1.77	16.16	21.79	15.20	59.23
14 - Burnham/Taplow	0.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.66	0.00	0.00	0.00	0.00	29.81	1.43	35.46
Other Zone 14	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.49	1.97	8.61
15 - Denham	0.00	0.00	0.00	0.16	1.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.22	4.06	5.57
15 - Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.17	9.17
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.99	4.99
Bucks sub-total	**88.71**	**58.21**	**11.38**	**101.48**	**161.67**	**77.42**	**19.14**	**92.84**	**158.25**	**151.77**	**122.74**	**142.73**	**186.93**	**117.26**	**47.40**	**1,537.93**
Outside Bucks																
Berkhamsted	0.00	0.82	3.32	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.05	0.00	0.00	0.00	6.35
Bicester	0.00	0.00	0.00	0.00	0.00	5.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.69
Hemel Hempstead	0.00	0.00	1.14	1.00	0.70	0.00	0.00	0.51	0.00	0.00	0.00	11.27	0.93	0.00	0.00	15.55
Henley-on-Thames	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.15	2.52	0.80	0.00	0.00	0.00	0.00	0.00	4.11
Leighton Buzzard	0.00	17.98	4.16	0.81	0.15	0.00	0.00	1.10	0.00	0.00	0.00	0.18	0.00	0.00	0.00	24.37
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.06	0.00	0.00	0.00	0.00	3.77	0.00	7.83
Milton Keynes/Bletchley	14.01	19.44	0.39	2.38	0.29	1.82	1.17	0.00	3.01	0.00	0.00	1.11	0.00	0.00	0.00	43.63
Oxford	0.59	0.75	0.00	1.90	0.00	9.28	13.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.09
Rickmansworth	0.00	0.00	0.00	0.00	0.61	0.00	0.00	0.00	0.00	0.00	0.00	0.40	10.76	0.00	2.30	14.07
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.24	0.00	0.00	0.00	0.67	12.33	24.73	38.97
Thame/Chinnor	0.00	0.00	0.00	0.89	0.89	22.86	45.78	4.64	0.00	0.54	0.00	0.00	0.00	0.00	0.59	76.19
Tring	0.00	11.05	29.58	6.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	0.00	0.00	48.64
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.45	0.00	0.00	0.92	0.00	11.94	13.31
Watford	0.89	0.00	0.00	0.55	0.00	0.00	0.00	0.00	0.00	1.05	0.00	0.62	4.38	0.65	0.00	8.14
Elsewhere	1.17	3.93	0.73	1.02	0.61	3.62	12.41	2.46	3.13	0.00	0.15	4.33	5.13	3.20	9.56	51.46
Outside Bucks sub-total	**16.66**	**53.96**	**39.33**	**15.19**	**3.26**	**43.28**	**73.58**	**8.86**	**13.96**	**2.85**	**0.15**	**21.48**	**22.79**	**19.95**	**49.13**	**384.42**
TOTAL	**105.37**	**112.18**	**50.72**	**116.67**	**164.93**	**120.70**	**92.72**	**101.70**	**172.21**	**154.62**	**122.89**	**164.20**	**209.71**	**137.22**	**96.53**	**1,922.36**

Source: Table 3 and Table 4

Table 7 - Future 2035 convenience goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2035	108.35	115.35	50.26	119.97	169.59	124.11	91.89	104.57	177.08	158.99	126.36	168.84	215.64	141.10	99.26	1,971.35
1 - Buckingham	67.60	5.12	0.00	0.63	0.16	7.57	0.00	0.00	0.00	0.00	0.00	0.00	1.25	0.00	0.00	82.32
1 - Winslow	15.27	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.48
Other Zone 1	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39
Zone 2 - Bucks north east	0.00	6.33	0.70	0.00	0.44	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.76
4 - Wendover	0.00	0.00	0.00	13.24	1.67	0.00	0.00	0.00	0.00	0.00	0.00	0.47	0.00	0.00	0.00	15.39
Other Zone 4	0.00	0.00	0.00	1.07	0.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.55
4/5 - Aylesbury	1.83	26.71	10.23	82.23	156.09	49.74	11.00	2.89	0.00	1.96	0.85	2.53	0.00	0.81	0.49	347.38
Zone 6 - Haddenham	0.00	1.32	0.00	0.63	1.59	8.17	1.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.82
Other Zone 6	0.00	0.00	0.12	0.00	0.00	9.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.93
8 - Princes Risborough	0.00	0.00	0.00	0.77	0.00	0.25	6.15	46.03	0.00	1.28	0.00	0.33	0.00	0.00	0.00	54.81
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.30	1.27	1.58	0.00	0.00	0.00	0.00	0.00	12.15
9 - Marlow	0.00	0.67	0.00	1.15	0.00	0.00	0.00	0.00	49.42	1.29	0.47	0.56	0.00	2.71	0.00	56.27
9 - Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.57	0.00	0.00	0.00	0.00	0.00	0.00	9.57
9 - Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.26	0.00	1.52	0.56	0.00	1.27	0.00	10.61
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	5.38	1.02	0.00	0.00	0.00	0.00	0.00	6.74
10/11 - High Wycombe	3.19	10.69	0.00	2.29	3.98	0.00	0.69	29.19	67.03	144.59	94.00	18.96	19.72	15.61	4.52	414.46
11 - Hazlemere	1.44	0.00	0.00	0.20	0.00	0.00	0.00	4.82	4.22	0.27	11.90	2.03	7.30	1.43	1.11	34.73
12 - Chesham	0.00	0.99	0.22	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	70.82	6.08	0.00	0.00	78.45
12 - Great Missenden / Prestwood	0.00	1.98	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	17.24	0.00	0.00	0.00	19.39
Other Zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.92	0.00	0.00	0.00	0.92
13 - Amersham on the Hill	0.00	0.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	4.53	27.73	0.81	0.00	34.41
13 - Amersham Old Town	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	2.39	0.15	7.47	23.89	47.52	1.89	1.60	86.22
13 - Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.82	0.00	0.00	8.82
13 - Chalfont St Peter	0.00	0.00	0.00	1.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.00	1.99	0.42	18.56
Other Zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.44	0.00	0.00	1.08	7.54	0.00	0.00	10.05
14 - Beaconsfield New Town	0.00	1.17	0.00	0.34	0.00	0.00	0.00	1.41	10.37	3.10	8.77	1.02	34.40	33.65	1.85	96.07
14 - Beaconsfield Old Town	0.00	1.84	0.00	0.00	0.48	3.77	0.00	0.00	0.00	0.83	0.00	0.00	0.22	0.45	0.89	8.48
14 - Gerrards Cross	0.91	2.36	0.00	0.00	0.00	0.00	0.00	0.00	0.61	0.00	0.54	1.82	16.62	22.41	15.63	60.90
14 - Burnham/Taplow	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.77	0.00	0.00	0.00	0.00	30.66	1.47	36.46
Other Zone 14	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.68	2.02	8.86
15 - Denham	0.00	0.00	0.00	0.16	1.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	4.18	5.72
15 - Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.43	9.43
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.13	5.13
Bucks sub-total	**91.21**	**59.86**	**11.28**	**104.35**	**166.24**	**79.61**	**18.97**	**95.46**	**162.73**	**156.06**	**126.20**	**146.76**	**192.21**	**120.58**	**48.74**	**1,580.27**
Outside Bucks																
Berkhamsted	0.00	0.85	3.29	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.11	0.00	0.00	0.00	6.41
Bicester	0.00	0.00	0.00	0.00	0.00	5.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.85
Hemel Hempstead	0.00	0.00	1.13	1.03	0.72	0.00	0.00	0.53	0.00	0.00	0.00	11.59	0.95	0.00	0.00	15.95
Henley-on-Thames	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.15	2.59	0.83	0.00	0.00	0.00	0.00	0.00	4.20
Leighton Buzzard	0.00	18.48	4.12	0.83	0.16	0.00	0.00	1.13	0.00	0.00	0.00	0.18	0.00	0.00	0.00	24.90
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.17	0.00	0.00	0.00	0.00	3.88	0.00	8.06
Milton Keynes/Bletchley	14.41	19.99	0.39	2.45	0.30	1.88	1.16	0.00	3.10	0.00	0.00	1.14	0.00	0.00	0.00	44.81
Oxford	0.61	0.77	0.00	1.95	0.00	9.54	13.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.32
Rickmansworth	0.00	0.00	0.00	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.41	11.06	0.00	2.36	14.47
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.00	0.00	0.69	12.68	25.43	40.07
Thame/Chinnor	0.00	0.00	0.00	0.92	0.91	23.51	45.37	4.77	0.00	0.56	0.00	0.00	0.00	0.00	0.61	76.65
Tring	0.00	11.36	29.32	6.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	48.92
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.95	0.00	12.28	13.69
Watford	0.91	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	1.08	0.00	0.64	4.50	0.67	0.00	8.37
Elsewhere	1.20	4.04	0.73	1.05	0.63	3.72	12.30	2.53	3.22	0.00	0.15	4.45	5.28	3.29	9.83	52.43
Outside Bucks sub-total	**17.13**	**55.49**	**38.98**	**15.62**	**3.35**	**44.50**	**72.92**	**9.11**	**14.35**	**2.93**	**0.15**	**22.08**	**23.43**	**20.52**	**50.52**	**391.08**
TOTAL	**108.35**	**115.35**	**50.26**	**119.97**	**169.59**	**124.11**	**91.89**	**104.57**	**177.08**	**158.99**	**126.36**	**168.84**	**215.64**	**141.10**	**99.26**	**1,971.35**

Source: Table 3 and Table 4

Table 8 - Future 2040 convenience goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2040	111.59	118.80	49.78	123.55	174.67	127.82	91.40	107.70	182.38	163.74	130.14	173.89	222.09	145.32	102.22	2,025.10
1 - Buckingham	69.62	5.27	0.00	0.65	0.16	7.79	0.00	0.00	0.00	0.00	0.00	0.00	1.29	0.00	0.00	84.79
1 - Winslow	15.73	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.94
Other Zone 1	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41
Zone 2 - Bucks north east	0.00	6.52	0.69	0.00	0.45	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.97
4 - Wendover	0.00	0.00	0.00	13.63	1.72	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.00	0.00	0.00	15.85
Other Zone 4	0.00	0.00	0.00	1.11	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.60
4/5 - Aylesbury	1.89	27.51	10.14	84.69	160.76	51.23	10.94	2.98	0.00	2.02	0.87	2.61	0.00	0.83	0.51	356.98
Zone 6 - Haddenham	0.00	1.35	0.00	0.65	1.64	8.41	1.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.17
Other Zone 6	0.00	0.00	0.12	0.00	0.00	10.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.22
8 - Princes Risborough	0.00	0.00	0.00	0.79	0.00	0.26	6.12	47.41	0.00	1.32	0.00	0.33	0.00	0.00	0.00	56.23
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.58	1.31	1.63	0.00	0.00	0.00	0.00	0.00	12.52
9 - Marlow	0.00	0.69	0.00	1.18	0.00	0.00	0.00	0.00	50.90	1.33	0.49	0.58	0.00	2.79	0.00	57.95
9 - Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.86	0.00	0.00	0.00	0.00	0.00	0.00	9.86
9 - Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.48	0.00	1.56	0.58	0.00	1.30	0.00	10.93
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35	5.54	1.05	0.00	0.00	0.00	0.00	0.00	6.94
10/11 - High Wycombe	3.29	11.01	0.00	2.35	4.10	0.00	0.69	30.06	69.03	148.91	96.81	19.52	20.31	16.08	4.65	426.83
11 - Hazlemere	1.48	0.00	0.00	0.21	0.00	0.00	0.00	4.96	4.34	0.28	12.26	2.09	7.52	1.47	1.15	35.77
12 - Chesham	0.00	1.02	0.22	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	72.94	6.26	0.00	0.00	80.79
12 - Great Missenden / Prestwood	0.00	2.04	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	17.75	0.00	0.00	0.00	19.97
Other Zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95	0.00	0.00	0.00	0.95
13 - Amersham on the Hill	0.00	0.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.70	4.67	28.56	0.83	0.00	35.44
13 - Amersham Old Town	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.34	2.46	0.16	7.70	24.61	48.95	1.95	1.65	88.80
13 - Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.09	0.00	0.00	9.09
13 - Chalfont St Peter	0.00	0.00	0.00	1.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.45	2.05	0.43	19.11
Other Zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.48	0.00	0.00	1.11	7.76	0.00	0.00	10.35
14 - Beaconsfield New Town	0.00	1.21	0.00	0.35	0.00	0.00	0.00	1.46	10.68	3.19	9.03	1.05	35.43	34.66	1.90	98.95
14 - Beaconsfield Old Town	0.00	1.90	0.00	0.00	0.49	3.89	0.00	0.00	0.00	0.85	0.00	0.00	0.23	0.46	0.91	8.73
14 - Gerrards Cross	0.94	2.43	0.00	0.00	0.00	0.00	0.00	0.00	0.63	0.00	0.56	1.88	17.11	23.08	16.09	62.72
14 - Burnham/Taplow	0.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.88	0.00	0.00	0.00	0.00	31.57	1.51	37.55
Other Zone 14	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.88	2.08	9.12
15 - Denham	0.00	0.00	0.00	0.16	1.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	4.30	5.90
15 - Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.71	9.71
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.29	5.29
Bucks sub-total	**93.94**	**61.65**	**11.17**	**107.47**	**171.22**	**81.99**	**18.87**	**98.32**	**167.59**	**160.73**	**129.98**	**151.15**	**197.96**	**124.18**	**50.20**	**1,626.42**
Outside Bucks																
Berkhamsted	0.00	0.87	3.26	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.17	0.00	0.00	0.00	6.47
Bicester	0.00	0.00	0.00	0.00	0.00	6.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.02
Hemel Hempstead	0.00	0.00	1.12	1.06	0.74	0.00	0.00	0.54	0.00	0.00	0.00	11.93	0.98	0.00	0.00	16.38
Henley-on-Thames	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.15	2.67	0.85	0.00	0.00	0.00	0.00	0.00	4.31
Leighton Buzzard	0.00	19.04	4.08	0.86	0.16	0.00	0.00	1.16	0.00	0.00	0.00	0.19	0.00	0.00	0.00	25.49
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.30	0.00	0.00	0.00	0.00	4.00	0.00	8.30
Milton Keynes/Bletchley	14.84	20.59	0.39	2.52	0.31	1.93	1.15	0.00	3.19	0.00	0.00	1.17	0.00	0.00	0.00	46.09
Oxford	0.63	0.79	0.00	2.01	0.00	9.83	13.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.64
Rickmansworth	0.00	0.00	0.00	0.00	0.65	0.00	0.00	0.00	0.00	0.00	0.00	0.42	11.39	0.00	2.44	14.90
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31	0.00	0.00	0.00	0.71	13.06	26.19	41.27
Thame/Chinnor	0.00	0.00	0.00	0.94	0.94	24.21	45.13	4.91	0.00	0.57	0.00	0.00	0.00	0.00	0.63	77.34
Tring	0.00	11.70	29.04	6.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.61	0.00	0.00	0.00	49.22
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	0.00	0.00	0.97	0.00	12.65	14.10
Watford	0.94	0.00	0.00	0.58	0.00	0.00	0.00	0.00	0.00	1.12	0.00	0.66	4.64	0.69	0.00	8.62
Elsewhere	1.24	4.16	0.72	1.08	0.65	3.84	12.23	2.61	3.31	0.00	0.16	4.58	5.44	3.39	10.13	53.54
Outside Bucks sub-total	**17.64**	**57.15**	**38.61**	**16.09**	**3.45**	**45.83**	**72.53**	**9.38**	**14.78**	**3.02**	**0.16**	**22.74**	**24.13**	**21.13**	**52.03**	**398.68**
TOTAL	**111.59**	**118.80**	**49.78**	**123.55**	**174.67**	**127.82**	**91.40**	**107.70**	**182.38**	**163.74**	**130.14**	**173.89**	**222.09**	**145.32**	**102.22**	**2,025.10**

Source: Table 3 and Table 4

Table 9 - Future 2045 convenience goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2045	116.10	123.60	49.72	128.55	181.73	132.99	91.49	112.05	189.75	170.36	135.40	180.92	231.07	151.19	106.36	2,101.28
1 - Buckingham	72.44	5.49	0.00	0.67	0.17	8.11	0.00	0.00	0.00	0.00	0.00	0.00	1.34	0.00	0.00	88.21
1 - Winslow	16.37	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.59
Other Zone 1	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42
Zone 2 - Bucks north east	0.00	6.78	0.69	0.00	0.47	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.26
4 - Wendover	0.00	0.00	0.00	14.19	1.79	0.00	0.00	0.00	0.00	0.00	0.00	0.51	0.00	0.00	0.00	16.49
Other Zone 4	0.00	0.00	0.00	1.15	0.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.66
4/5 - Aylesbury	1.96	28.62	10.13	88.12	167.25	53.30	10.96	3.10	0.00	2.10	0.91	2.71	0.00	0.86	0.53	370.55
Zone 6 - Haddenham	0.00	1.41	0.00	0.67	1.70	8.75	1.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.65
Other Zone 6	0.00	0.00	0.12	0.00	0.00	10.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.63
8 - Princes Risborough	0.00	0.00	0.00	0.83	0.00	0.27	6.13	49.32	0.00	1.37	0.00	0.35	0.00	0.00	0.00	58.26
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.97	1.36	1.70	0.00	0.00	0.00	0.00	0.00	13.02
9 - Marlow	0.00	0.72	0.00	1.23	0.00	0.00	0.00	0.00	52.95	1.38	0.51	0.60	0.00	2.90	0.00	60.29
9 - Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.26	0.00	0.00	0.00	0.00	0.00	0.00	10.26
9 - Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.78	0.00	1.63	0.60	0.00	1.36	0.00	11.37
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.37	5.77	1.09	0.00	0.00	0.00	0.00	0.00	7.22
10/11 - High Wycombe	3.42	11.46	0.00	2.45	4.26	0.00	0.69	31.28	71.82	154.93	100.73	20.31	21.13	16.73	4.84	444.06
11 - Hazlemere	1.54	0.00	0.00	0.22	0.00	0.00	0.00	5.16	4.52	0.29	12.75	2.17	7.83	1.53	1.19	37.22
12 - Chesham	0.00	1.06	0.22	0.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	75.89	6.51	0.00	0.00	84.04
12 - Great Missenden / Prestwood	0.00	2.13	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	18.47	0.00	0.00	0.00	20.78
Other Zone 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.99
13 - Amersham on the Hill	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73	4.86	29.71	0.86	0.00	36.87
13 - Amersham Old Town	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.40	2.56	0.16	8.01	25.60	50.92	2.02	1.72	92.39
13 - Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.45	0.00	0.00	9.45
13 - Chalfont St Peter	0.00	0.00	0.00	1.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.07	2.13	0.45	19.88
Other Zone 13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.54	0.00	0.00	1.15	8.07	0.00	0.00	10.77
14 - Beaconsfield New Town	0.00	1.25	0.00	0.36	0.00	0.00	0.00	1.51	11.11	3.32	9.40	1.09	36.86	36.06	1.98	102.95
14 - Beaconsfield Old Town	0.00	1.97	0.00	0.00	0.51	4.04	0.00	0.00	0.00	0.89	0.00	0.00	0.24	0.48	0.95	9.09
14 - Gerrards Cross	0.98	2.53	0.00	0.00	0.00	0.00	0.00	0.00	0.66	0.00	0.58	1.96	17.81	24.01	16.74	65.26
14 - Burnham/Taplow	0.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.03	0.00	0.00	0.00	0.00	32.85	1.57	39.07
Other Zone 14	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.15	2.17	9.49
15 - Denham	0.00	0.00	0.00	0.17	1.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	4.48	6.13
15 - Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.10	10.10
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.50	5.50
Bucks sub-total	**97.74**	**64.14**	**11.16**	**111.81**	**178.14**	**85.31**	**18.89**	**102.29**	**174.37**	**167.22**	**135.23**	**157.26**	**205.96**	**129.20**	**52.23**	**1,690.95**
Outside Bucks																
Berkhamsted	0.00	0.91	3.26	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.26	0.00	0.00	0.00	6.60
Bicester	0.00	0.00	0.00	0.00	0.00	6.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.27
Hemel Hempstead	0.00	0.00	1.12	1.10	0.77	0.00	0.00	0.56	0.00	0.00	0.00	12.42	1.02	0.00	0.00	17.00
Henley-on-Thames	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.16	2.77	0.89	0.00	0.00	0.00	0.00	0.00	4.46
Leighton Buzzard	0.00	19.81	4.08	0.89	0.17	0.00	0.00	1.21	0.00	0.00	0.00	0.20	0.00	0.00	0.00	26.35
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.47	0.00	0.00	0.00	0.00	4.16	0.00	8.63
Milton Keynes/Bletchley	15.44	21.42	0.38	2.62	0.32	2.01	1.16	0.00	3.32	0.00	0.00	1.22	0.00	0.00	0.00	47.89
Oxford	0.65	0.82	0.00	2.09	0.00	10.23	13.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	27.19
Rickmansworth	0.00	0.00	0.00	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.44	11.86	0.00	2.53	15.50
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.36	0.00	0.00	0.00	0.74	13.58	27.25	42.93
Thame/Chinnor	0.00	0.00	0.00	0.98	0.98	25.19	45.18	5.11	0.00	0.59	0.00	0.00	0.00	0.00	0.65	78.68
Tring	0.00	12.17	29.00	7.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.68	0.00	0.00	0.00	50.01
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	1.01	0.00	13.16	14.67
Watford	0.98	0.00	0.00	0.60	0.00	0.00	0.00	0.00	0.00	1.16	0.00	0.69	4.83	0.71	0.00	8.97
Elsewhere	1.29	4.33	0.72	1.12	0.68	3.99	12.24	2.72	3.45	0.00	0.17	4.77	5.66	3.53	10.53	55.19
Outside Bucks sub-total	**18.36**	**59.46**	**38.56**	**16.74**	**3.59**	**47.68**	**72.60**	**9.76**	**15.38**	**3.14**	**0.17**	**23.66**	**25.11**	**21.99**	**54.13**	**410.32**
TOTAL	**116.10**	**123.60**	**49.72**	**128.55**	**181.73**	**132.99**	**91.49**	**112.05**	**189.75**	**170.36**	**135.40**	**180.92**	**231.07**	**151.19**	**106.36**	**2,101.28**

Source: Table 3 and Table 4

Table 10A - Convenience goods floorspace and benchmark turnover in main towns Buckinghamshire (North)

Zone / Location	Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Zone 1	Aldi, Osier Way	1,140	80%	912	£11,748	£10.71
Buckingham	Asda Express, Buckingham Ring Road	84	95%	80	£11,105	£0.89
	Lidl, Needlepin Way	1,543	80%	1,234	£8,585	£10.60
	M&S Simply Food, Stratford Rd	84	95%	80	£10,934	£0.87
	Sainsbury's Local, Chandos Rd	283	95%	269	£13,869	£3.73
	Tesco, London Road	3,332	80%	2,666	£16,226	£43.25
	Tesco Express, Market Hill	135	95%	128	£16,226	£2.08
	Waitrose, Meadow Walk	834	90%	751	£15,126	£11.35
	Other Buckingham	600	100%	600	£8,000	£4.80
	Sub-Total	**8,035**		**6,719**		**£88.29**
Zone 1	Co-op, High Street	157	95%	149	£12,059	£1.80
Winslow	One Stop, High Street	140	95%	133	£10,035	£1.33
	Londis, Gulf PFS	100	100%	100	£8,000	£0.80
	Other Winslow	100	100%	100	£8,000	£0.80
	Sub Total	**497**		**482**		**£4.73**
Zone 4	Budgens, High Street	457	95%	434	£8,666	£3.76
Wendover	Tesco Express, Tring Rd	110	95%	105	£16,226	£1.70
	Tesco Express, Kingsbrook Basin	175	95%	166	£16,226	£2.70
	Other Wendover	200	100%	200	£8,000	£1.60
	Sub-Total	**942**		**905**		**£9.76**
Zone 4/5	Aldi, Rimmington Way	988	80%	790	£11,748	£9.29
Aylesbury	Aldi, Cambridge St	848	80%	678	£11,748	£7.97
	Asda, Mandeville Rd	1,390	75%	1,043	£11,105	£11.58
	Asda Express, Wendover Rd	84	95%	80	£11,105	£0.89
	B&M Homestore, Cambridge Cl.	1,206	30%	362	£3,546	£1.28
	Budgens, Aylesbury Road	169	95%	161	£8,666	£1.39
	Budgens, Mandeville Rd	364	95%	346	£8,666	£3.00
	Farmfoods, Aylesbury Shopping Park	449	95%	427	£5,622	£2.40
	Iceland, High St	426	95%	405	£7,180	£2.91
	Iceland Food Warehouse, Aylesbury SP	737	95%	700	£7,180	£5.03
	Lidl, Oakfield Rd	1,032	80%	826	£8,585	£7.09
	Lidl, Cambridge Close	920	80%	736	£8,585	£6.32
	M&S Food Hall, High St	697	95%	662	£10,934	£7.24
	M&S Food Hall, Broadfields	852	95%	809	£10,934	£8.85
	Morrisons, Station Way	3,663	75%	2,747	£10,904	£29.96
	Sainsbury's, Buckingham St	1,584	80%	1,267	£13,869	£17.57
	Sainsbury's, Gatehouse Rd	4,546	80%	3,637	£13,869	£50.44
	Sainsbury's Local, Berryfields	236	95%	224	£13,869	£3.11
	Sainsbury's Local, Oakfield Rd	204	95%	194	£13,869	£2.69
	Sainsbury's Local, Jansel Square	145	95%	138	£13,869	£1.91
	Tesco, Tring Rd	5,051	60%	3,031	£16,226	£49.17
	Tesco Express, Aylesbury Meadow	175	95%	166	£16,226	£2.70
	Tesco Express, Jackson Rd	142	95%	135	£16,226	£2.19
	Tesco Extra, Broadfields RP	6,158	60%	3,695	£16,226	£59.95
	Co-op, Jansel Sq	393	95%	373	£12,059	£4.50
	Co-op, Hannon Rd	275	95%	261	£12,059	£3.15
	Co-op, Orwell Drive	827	90%	744	£12,059	£8.98
	Co-op, Wedgewood St	288	95%	274	£12,059	£3.30
	Waitrose, Waterside	1,894	90%	1,705	£15,126	£25.78
	Other Aylesbury	1,900	100%	1,900	£8,000	£15.20
	Sub-Total	**37,643**		**28,514**		**£355.82**
Zone 8	M&S Simply Food, Horns Lane	576	95%	547	£10,934	£5.98
Princes	Tesco, Longwick Rd	1,212	90%	1,091	£16,226	£17.70
Risborough	Co-op, Bell St	232	95%	220	£12,059	£2.66
	Asda Express, Bell Street	84	95%	80	£11,105	£0.89
	Morrsions Daily, Horns Lane	129	95%	123	£10,904	£1.34
	Other Princes Risborough	400	100%	400	£8,000	£3.20
	Sub-Total	**2,633**		**2,461**		**£31.76**
TOTAL		**49,750**		**39,082**		**£490.36**

Source: *Goad Plans 2022, ORC StorePoint 2025 VOA and Global Data 2025*

Table 10B - Convenience goods floorspace and benchmark turnover in main towns Buckinghamshire (South)

Zone / Location	Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Zone 9	M&S Simply Food, Spittal St	86	95%	82	£10,934	£0.89
Marlow	Sainsbury's, West St	1,626	90%	1,463	£13,869	£20.30
	Sainsbury's Local, High St	265	95%	252	£13,869	£3.49
	Lidl, Marlow	1,032	85%	877	£8,585	£7.53
	Other Marlow	900	100%	900	£8,000	£7.20
	Sub Total	**3,909**		**3,574**		**£39.41**
Zone 10	Aldi, Baker St	1,109	80%	887	£11,748	£10.42
High	Aldi, Crest Road	971	80%	777	£11,748	£9.13
Wycombe	Aldi, Tannery Rd	1,018	80%	814	£11,748	£9.57
	Asda, Holmers Farm Way	6,157	65%	4,002	£11,105	£44.44
	B&M Bargains, High St	683	30%	205	£3,546	£0.73
	Budgens, West Wycombe Rd	200	95%	190	£8,666	£1.65
	Iceland, High St	683	95%	649	£7,180	£4.66
	Lidl, Desborough Ave.	898	80%	718	£8,585	£6.17
	M&S Food Hall, Eden Shopping Centre	697	95%	662	£10,934	£7.24
	Co-op, Plomer Green Ln	827	95%	786	£12,059	£9.47
	Morrisons, Bellfield Rd	3,516	80%	2,813	£10,904	£30.67
	Sainsbury's, Oxford Rd	6,092	65%	3,960	£13,869	£54.92
	Tesco, Newlands	5,472	70%	3,830	£16,226	£62.15
	Tesco Express, Chapel Ln	220	95%	209	£16,226	£3.39
	Tesco Express, Eden Shopping Centre	175	95%	166	£16,226	£2.70
	Tesco Express, New Rd	258	95%	245	£16,226	£3.98
	Tesco Express, Marlow Rd	116	95%	110	£16,226	£1.79
	Tesco Express, Plomer Green Ln	242	95%	230	£16,226	£3.73
	Waitrose, Marlow Hill	1,747	90%	1,572	£15,126	£23.78
	Other High Wycombe town centre	2,400	100%	2,400	£8,000	£19.20
	Sub-Total	**33,481**		**25,226**		**£309.78**
Zone 11	Tesco, London Rd, Loudwater	3,174	80%	2,539	£16,226	£41.20
Loudwater	Lidl, London Rd	1,702	80%	1,362	£8,585	£11.69
	M&S Food Hall, Wycombe RP	852	95%	809	£10,934	£8.85
	Tesco Express, Wycombe RP	233	30%	70	£16,226	£1.13
	Morrisons Daliy, Loudwater	129	95%	123	£10,904	£1.34
	Tesco Express, Amersham Rd	202	95%	192	£16,226	£3.11
	Tesco Express, Hatter's Ln	230	95%	219	£16,226	£3.55
	Home Bargains, Knaves Beech Way	780	30%	234	£6,731	£1.58
	Sub-Total	**7,302**		**5,547**		**£72.45**
Zone 12	Sainsbury's, Elgiva Ln	2,571	80%	2,057	£13,869	£28.53
Chesham	Tesco Express, Broad St	175	95%	166	£16,226	£2.70
	Waitrose, The Backs	1,609	90%	1,448	£15,126	£21.90
	Other Chesham	900	100%	900	£8,000	£7.20
	Sub Total	**5,255**		**4,571**		**£60.33**
Zone 12	Co-op, Great Misseden	312	95%	296	£12,059	£3.57
Gr Missenden	Other Great Missenden	150	100%	150	£8,000	£1.20
Prestwood	Sainsbury's Local, Prestwood	157	95%	149	£13,869	£2.07
	Co-op, High St, Prestwood	328	95%	312	£12,059	£3.76
	Sub Total	**947**		**907**		**£10.60**
Zone 13	Tesco, Amerhsam Old Town	4,807	80%	3,846	£16,226	£62.40
Amersham	Other Old Amersham	100	100%	100	£8,000	£0.80
	Little Waitrose, Amersham-on-the Hill	404	95%	384	£15,126	£5.81
	M&S Simply Food, Amersham-on-the Hill	626	100%	626	£10,934	£6.84
	Tesco Express, Amersham-on-the Hill	141	95%	134	£16,226	£2.17
	Other Amersham-on-the-Hill	1,000	95%	950	£8,000	£7.60
	Sub Total	**7,078**		**6,039**		**£85.62**
Zone 14	Tesco Express, Beaconsfield Old Town	132	95%	125	£16,226	£2.03
Beaconsfield	Asda Express, Oxford Rd, Beaconsfield	84	95%	80	£11,105	£0.89
	Other Beaconsfield Old Town	60	100%	60	£8,000	£0.48
	M&S Simply Food, Beaconsfield New Town	398	95%	378	£10,934	£4.13
	Morrisons Daliy, Beaconsfield New Town	129	95%	123	£10,904	£1.34
	Sainsbury's, Beaonsfield New Town	4,294	80%	3,435	£13,869	£47.64
	Waitrose, Beaonsfield New Town	989	95%	940	£15,126	£14.21
	Other Beaconsfield New Town	1,100	100%	1,100	£8,000	£8.80
	Sub Total	**7,186**		**6,241**		**£79.53**
Zone 14	Tesco, Gerrards Cross	2,027	85%	1,723	£16,226	£27.96
Gerrards	Waitrose, Gerrards Cross	1,429	90%	1,286	£15,126	£19.45
Cross /	M&S Simply Food (BP), Gerrards Cross	84	95%	80	£10,934	£0.87
	Other Gerrards Cross	650	100%	650	£8,000	£5.20
	Sub Total	**4,190**		**3,739**		**£53.48**
TOTAL		**69,348**		**55,844**		**£711.20**

Source: *Goad Plans 2022, ORC StorePoint 2025, VOA and Global Data 2025*

Table 10C - Convenience goods floorspace and benchmark turnover in stores outside the main towns in Buckinghamshire

Zone / Location	Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Zone 6	Co-op, Haddenham	232	95%	220	£12,059	£2.66
	Morrisons Daily, Haddenham	129	95%	123	£10,904	£1.34
	Co-op, Stone	94	95%	89	£12,059	£1.08
	Co-op, Steeple Claydon	232	95%	220	£12,059	£2.66
	Sub Total	**687**		**653**		**£7.73**
Zone 8	Co-op, Walter's Ash	258	95%	245	£12,059	£2.96
	Tesco Express, Stokenchurch	222	95%	211	£16,226	£3.42
	Sub-Total	**480**		**456**		**£6.38**
Zone 9	M&S Simply Food, Bourne End	84	95%	80	£10,934	£0.87
	Tesco Express, Bourne End	249	95%	237	£16,226	£3.84
	Co-op, Marlow Rd, Bourne End	232	95%	220	£12,059	£2.66
	Sainsbury's Local, Flackwell Heath	213	95%	202	£14,411	£2.92
	Tesco Express, Wooburn Green	122	95%	116	£13,869	£1.61
	Sub-Total	**900**		**855**		**£11.89**
Zone 11	Asda Express, Hazlemere	84	95%	80	£11,105	£0.89
	Co-op, Park Parade, Hazlemere	726	90%	653	£12,060	£7.88
	Co-op, Rose Ave, Hazlemere	70	95%	67	£12,059	£0.80
	Little Waitrose, Hazlemere	84	95%	80	£15,126	£1.21
	Tesco Express, Hazlemere	202	95%	192	£16,226	£3.11
	Sub-Total	**1,166**		**1,071**		**£13.89**
Zone 13	Co-op, Chalfont St Giles	286	95%	272	£12,059	£3.28
	Budgens, Challfont St Peter	384	95%	365	£8,666	£3.16
	M&S Food Hall, Chalfont St Peter	580	95%	551	£10,934	£6.02
	M&S Simply Food, White Lion Rd	84	95%	80	£10,934	£0.87
	Morrisons Daily, Chalfont St Peter	129	95%	123	£16,226	£1.99
	Tesco Express Little Chalfont	116	95%	110	£16,226	£1.79
	Tesco Express, Chalfont St Peter	798	95%	758	£16,226	£12.30
	Sub-Total	**2,377**		**2,258**		**£29.41**
Zone 14	Sainsbury's Local, Farnham Common	236	95%	224	£13,869	£3.11
	Tesco Express, Farnham Common	175	95%	166	£16,226	£2.70
	Sainsbury's, Lake End Rd, Taplow	4,433	80%	3,546	£13,869	£49.19
	Tesco, Bath Rd, Taplow	3,411	80%	2,729	£16,226	£44.28
	Budgens, High St, Burnham	393	95%	373	£8,666	£3.24
	Morrisons Daily, High St, Burnham	129	95%	123	£10,904	£1.34
	Tesco Express, High St, Burnham	381	95%	362	£16,226	£5.87
	Sub-Total	**9,158**		**7,524**		**£109.71**
Zone 15	Co-op, High St, Iver	232	95%	220	£12,059	£2.66
	Co-op, Iver Heath	261	95%	248	£12,059	£2.99
	Morrisons Daliy, Iver Heath	129	95%	123	£10,904	£1.34
	Tesco Express, Iver Heath	116	95%	110	£16,226	£1.79
	Asda Express, Denham	84	95%	80	£11,105	£0.89
	Co-op, Stokes Poges	232	95%	220	£12,059	£2.66
	Sub-Total	**1,054**		**1,001**		**£12.32**
		15,822		**13,818**		**£191.33**

Source: *Goad Plans 2022, ORC StorePoint 2025 VOA and Global Data 2025*

Table 11A - North Buckinghamshire summary of convenience goods expenditure 2024 to 2045 (£M)

Zone / Destination	2024	2030	2035	2040	2045
Available expenditure					
1 - Buckingham	78.02	80.06	82.32	84.79	88.21
1 - Winslow	14.67	15.05	15.48	15.94	16.59
1 - Other Zone 1	0.37	0.38	0.39	0.41	0.42
2 - Buckinghamshire rural northeast	7.42	7.58	7.76	7.97	8.26
4 - Wendover	14.58	14.96	15.39	15.85	16.49
4 - Other Zone 4	1.47	1.51	1.55	1.60	1.66
4/5 - Aylesbury urban	330.97	338.61	347.38	356.98	370.55
6 - Buckingham rural northwest	21.67	22.17	22.75	23.39	24.29
8 - Princes Risborough	52.46	53.53	54.81	56.23	58.26
8 - Other Zone 8	11.52	11.82	12.15	12.52	13.02
Total	**533.15**	**545.67**	**560.00**	**575.67**	**597.76**
Turnover of existing facilities					
1 - Buckingham	78.02	77.94	77.63	77.24	76.85
1 - Winslow	14.67	14.66	14.60	14.52	14.45
1 - Other Zone 1	0.37	0.37	0.37	0.37	0.37
2 - Buckinghamshire rural northeast	7.42	7.41	7.38	7.34	7.30
4 - Wendover	14.58	14.57	14.51	14.44	14.36
4 - Other Zone 4	1.47	1.47	1.46	1.46	1.45
4/5 - Aylesbury urban	330.97	330.64	329.32	327.68	326.04
6 - Buckingham rural northwest	21.67	21.65	21.56	21.45	21.35
8 - Princes Risborough	52.46	52.41	52.20	51.94	51.68
8 - Other Zone 8	11.52	11.51	11.46	11.40	11.35
Total	**533.15**	**532.61**	**530.48**	**527.84**	**525.20**
Surplus/deficit expenditure £M					
1 - Buckingham	0.00	2.12	4.70	7.55	11.36
1 - Winslow	0.00	0.40	0.88	1.42	2.14
1 - Other Zone 1	0.00	0.01	0.02	0.04	0.05
2 - Buckinghamshire rural northeast	0.00	0.17	0.39	0.63	0.96
4 - Wendover	0.00	0.40	0.88	1.41	2.12
4 - Other Zone 4	0.00	0.04	0.09	0.14	0.21
4/5 - Aylesbury urban	0.00	7.96	18.05	29.30	44.51
6 - Buckingham rural northwest	0.00	0.53	1.19	1.94	2.94
8 - Princes Risborough	0.00	1.12	2.61	4.29	6.58
8 - Other Zone 8	0.00	0.31	0.69	1.11	1.68
Total	**0.00**	**11.63**	**26.21**	**42.42**	**64.30**

Source: Tables 5 to 9

Table 11B - South Buckinghamshire summary of convenience goods expenditure 2024 to 2045 (£M)

Zone / Destination	2024	2030	2035	2040	2045
Available expenditure					
9 - Marlow	53.32	54.72	56.27	57.95	60.29
9 - Other Zone 9	25.51	26.18	26.92	27.73	28.85
10/11 - High Wycombe urban	392.82	403.09	414.46	426.83	444.06
11 - Hazlemere	32.91	33.78	34.73	35.77	37.22
12 - Chesham	74.36	76.30	78.45	80.79	84.04
12 - Great Missenden / Prestwood	18.38	18.86	19.39	19.97	20.78
12 - Other Zone 12	0.87	0.90	0.92	0.95	0.99
13 - Amersham	114.32	117.32	120.64	124.24	129.27
13 - Other Zone 13	35.47	36.40	37.43	38.55	40.11
14 - Beaconsfield	99.08	101.68	104.55	107.68	112.03
14 - Gerrards Cross	57.71	59.23	60.90	62.72	65.26
14 - Other Zone 14	42.95	44.07	45.32	46.67	48.56
15 - Denham/Iver	19.22	19.73	20.28	20.89	21.73
Total	**966.94**	**992.26**	**1,020.27**	**1,050.76**	**1,093.19**
Turnover of existing facilities					
9 - Marlow	53.32	53.27	53.06	52.79	52.53
9 - Other Zone 9	25.51	25.49	25.39	25.26	25.13
10/11 - High Wycombe urban	392.82	392.43	390.86	388.91	386.97
11 - Hazlemere	32.91	32.88	32.75	32.59	32.42
12 - Chesham	74.36	74.29	73.99	73.62	73.25
12 - Great Missenden / Prestwood	18.38	18.36	18.29	18.20	18.10
12 - Other Zone 12	0.87	0.87	0.87	0.86	0.86
13 - Amersham	114.32	114.21	113.75	113.18	112.62
13 - Other Zone 13	35.47	35.44	35.30	35.12	34.94
14 - Beaconsfield	99.08	98.98	98.59	98.09	97.60
14 - Gerrards Cross	57.71	57.66	57.42	57.14	56.85
14 - Other Zone 14	42.95	42.90	42.73	42.52	42.31
15 - Denham/Iver	19.22	19.20	19.13	19.03	18.94
Total	**966.94**	**965.98**	**962.12**	**957.32**	**952.54**
Surplus/deficit expenditure £M					
9 - Marlow	0.00	1.45	3.21	5.16	7.76
9 - Other Zone 9	0.00	0.69	1.54	2.47	3.72
10/11 - High Wycombe urban	0.00	10.66	23.60	37.92	57.09
11 - Hazlemere	0.00	0.90	1.98	3.18	4.79
12 - Chesham	0.00	2.01	4.46	7.17	10.79
12 - Great Missenden / Prestwood	0.00	0.50	1.11	1.78	2.68
12 - Other Zone 12	0.00	0.02	0.05	0.08	0.13
13 - Amersham	0.00	3.11	6.88	11.06	16.65
13 - Other Zone 13	0.00	0.97	2.14	3.43	5.17
14 - Beaconsfield	0.00	2.70	5.97	9.59	14.43
14 - Gerrards Cross	0.00	1.57	3.48	5.58	8.40
14 - Other Zone 14	0.00	1.17	2.59	4.16	6.25
15 - Denham/Iver	0.00	0.52	1.16	1.86	2.80
Total	**0.00**	**26.28**	**58.15**	**93.44**	**140.65**

Source: Tables 5 to 9

Table 12 - Buckinghamshire convenience goods floorspace capacity up to 2045

Zone / Destination	2024	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m) *	£12,845	£12,832	£12,781	£12,717	£12,654
Floorspace projection (sq.m net)					
1 - Buckingham	0	166	369	596	902
1 - Winslow	0	31	69	112	169
2 - Buckinghamshire rural northeast	0	13	30	49	76
4 - Wendover / Other Zone 4	0	34	76	122	185
5 - Aylesbury urban	0	621	1,413	2,304	3,517
6 - Buckingham rural northwest	0	41	93	152	232
8 - Princes Risborough	0	112	259	425	653
9 - Marlow / Other Zone 9	0	167	371	600	907
10/11 - High Wycombe urban /Hazlemere	0	901	2,001	3,232	4,890
12 - Chesham	0	159	353	570	863
12 - Great Missenden / Prestwood	0	39	87	140	212
13 - Amersham / Other Zone 13	0	318	706	1,140	1,724
14 - Beaconsfield	0	301	669	1,081	1,634
14 - Gerrards Cross	0	122	272	439	664
15 - Denham/Iver	0	41	91	146	221
Total	**0**	**3,066**	**6,859**	**11,109**	**16,850**
Floorspace Projection (sq.m gross)					
1 - Buckingham	0	238	528	852	1,289
1 - Winslow	0	44	99	159	241
2 - Buckinghamshire rural northeast	0	19	43	70	108
4 - Wendover / Other Zone 4	0	49	108	174	264
5 - Aylesbury urban	0	886	2,018	3,291	5,025
6 - Buckingham rural northwest	0	59	133	218	332
8 - Princes Risborough	0	160	369	608	933
9 - Marlow / Other Zone 9	0	239	531	857	1,296
10/11 - High Wycombe urban /Hazlemere	0	1,287	2,859	4,618	6,986
12 - Chesham	0	227	504	815	1,233
12 - Great Missenden / Prestwood	0	56	124	200	302
13 - Amersham / Other Zone 13	0	454	1,008	1,628	2,463
14 - Beaconsfield	0	431	956	1,544	2,335
14 - Gerrards Cross	0	175	388	627	949
15 - Denham/Iver	0	58	129	209	316
Total	**0**	**4,380**	**9,798**	**15,869**	**24,071**

Source: Tables 11A and 11B

* combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)

Appendix 3 Comparison goods capacity

Table 1 - Study area population projections

Zone	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	34,473	36,659	38,358	40,204	42,250
2 - Buckinghamshire rural northeast	36,644	38,968	40,773	42,736	44,910
3 - Tring	16,973	17,219	17,363	17,502	17,658
4 - Aylesbury southeast/Wendover	40,195	42,744	44,724	46,877	49,262
5 - Aylesbury urban	61,526	65,428	68,459	71,754	75,405
6 - Buckingham rural northwest	41,003	43,603	45,623	47,819	50,253
7 - Thame/Chinnor	31,449	31,860	32,130	32,524	32,883
8 - Princes Risborough	31,905	33,928	35,500	37,209	39,102
9 - Marlow	52,437	55,762	58,346	61,154	64,266
10 - High Wycombe west	60,894	64,756	67,756	71,017	74,631
11 - High Wycombe east	43,944	46,731	48,896	51,249	53,857
12 - Chesham/Great Missenden	52,203	55,514	58,086	60,881	63,979
13 - Amersham/Chalfonts	63,067	67,067	70,174	73,551	77,294
14 - Beaconsfield/Gerrards Cross	41,076	43,681	45,705	47,904	50,342
15 - Denham/Iver	31,660	33,668	35,228	36,923	38,802
Total	**639,449**	**677,588**	**707,120**	**739,305**	**774,894**

Sources:
Local Housing Need of 4,490 dpa using the latest standard method calculation assuming backlog demand
Experian population projections (March 2025) for Zones 3 and 7 outside Buckinghamshire

Table 2 - Comparison goods expenditure per person per annum (£)

	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	3,636	3,952	4,386	4,869	5,536
2 - Buckinghamshire rural northeast	3,695	4,016	4,457	4,948	5,626
3 - Tring	3,784	4,114	4,565	5,069	5,763
4 - Aylesbury southeast/Wendover	3,484	3,787	4,203	4,666	5,305
5 - Aylesbury urban	2,896	3,148	3,494	3,879	4,410
6 - Buckingham rural northwest	3,549	3,857	4,281	4,753	5,404
7 - Thame/Chinnor	3,650	3,968	4,403	4,888	5,558
8 - Princes Risborough	3,929	4,271	4,740	5,263	5,983
9 - Marlow	3,940	4,283	4,753	5,277	6,000
10 - High Wycombe west	2,843	3,091	3,430	3,808	4,329
11 - High Wycombe east	3,165	3,440	3,818	4,239	4,819
12 - Chesham/Great Missenden	3,787	4,117	4,569	5,073	5,767
13 - Amersham/Chalfonts	4,024	4,374	4,854	5,389	6,127
14 - Beaconsfield/Gerrards Cross	3,935	4,277	4,747	5,270	5,991
15 - Denham/Iver	3,551	3,860	4,284	4,756	5,407

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 22 (March 2025)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	125.33	144.87	168.23	195.76	233.89
2 - Buckinghamshire rural northeast	135.38	156.49	181.72	211.46	252.65
3 - Tring	64.23	70.83	79.27	88.71	101.76
4 - Aylesbury southeast/Wendover	140.03	161.87	187.96	218.72	261.33
5 - Aylesbury urban	178.18	205.97	239.17	278.32	332.53
6 - Buckingham rural northwest	145.51	168.20	195.31	227.28	271.55
7 - Thame/Chinnor	114.79	126.41	141.47	158.99	182.76
8 - Princes Risborough	125.37	144.92	168.28	195.82	233.97
9 - Marlow	206.60	238.82	277.32	322.71	385.57
10 - High Wycombe west	173.13	200.13	232.39	270.43	323.11
11 - High Wycombe east	139.08	160.77	186.69	217.24	259.56
12 - Chesham/Great Missenden	197.71	228.55	265.39	308.82	368.98
13 - Amersham/Chalfonts	253.77	293.35	340.63	396.38	473.60
14 - Beaconsfield/Gerrards Cross	161.62	186.83	216.94	252.45	301.62
15 - Denham/Iver	112.42	129.96	150.90	175.60	209.81
Total	**2,273.18**	**2,617.97**	**3,031.65**	**3,518.71**	**4,192.68**

Source: Tables 1 and 2

Table 4 - Base year comparison goods market shares by zone (%)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Zone 1															
Buckingham	17.1%	0.5%	0.0%	1.1%	0.0%	2.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Winslow	1.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2															
Other Zone 2	0.0%	0.1%	0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4															
Wendover	0.5%	1.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Other Zone 4	0.0%	0.0%	0.9%	0.7%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Zone 5															
Aylesbury	8.8%	19.3%	37.8%	58.8%	74.4%	36.9%	26.9%	18.0%	1.6%	2.8%	0.7%	4.7%	1.2%	4.3%	1.2%
Zone 6															
Other Zone 6	1.3%	1.0%	0.6%	1.7%	2.8%	5.1%	3.0%	1.1%	0.0%	0.1%	0.1%	0.5%	0.1%	0.0%	0.0%
Zone 8															
Princes Risborough	0.0%	2.7%	0.0%	0.5%	0.5%	0.5%	1.4%	12.6%	0.0%	0.5%	0.0%	0.2%	0.0%	0.0%	0.0%
Other Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	1.3%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 9															
Marlow	0.0%	1.2%	0.0%	0.0%	0.0%	0.1%	0.4%	0.2%	14.1%	1.4%	0.2%	1.0%	1.3%	0.5%	0.6%
Bourne End	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	3.2%	0.0%	0.5%	0.0%	0.1%	0.8%	0.0%
Flackwell Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%
Zone 10/11															
High Wycombe	2.2%	2.2%	3.7%	10.1%	4.2%	7.1%	14.4%	49.0%	60.7%	85.2%	83.7%	27.5%	40.6%	28.2%	11.6%
Hazlemere	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.4%	1.1%	0.0%	1.1%	0.1%	1.2%	0.0%	0.0%
Zone 12															
Chesham	0.2%	1.4%	0.3%	0.0%	0.0%	0.1%	0.0%	0.3%	0.0%	0.1%	0.1%	22.7%	1.7%	0.0%	0.0%
Great Missenden/Prestwood	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	2.8%	0.2%	0.0%	0.0%
Zone 13															
Amersham on the Hill	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	3.2%	12.1%	0.0%	0.0%
Amersham Old Town	0.4%	0.7%	0.0%	0.7%	0.0%	0.0%	0.0%	1.5%	0.4%	0.2%	0.9%	1.9%	2.7%	0.6%	0.0%
Chalfont St Giles	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%
Chalfont St Peter	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	2.0%	0.4%	0.0%
Other Zone 13	0.0%	0.0%	0.0%	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%	0.0%	0.0%
Zone 14															
Beaconsfield New Town	0.0%	2.6%	0.0%	0.0%	0.1%	0.0%	0.0%	1.5%	1.2%	0.2%	3.7%	0.4%	4.1%	8.9%	0.6%
Beaconsfield Old Town	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.6%	0.1%
Gerrards Cross	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	3.4%	3.5%
Burnham/Taplow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%	0.1%	0.0%	0.3%	7.0%	0.5%
Other Zone 14	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	2.3%	0.7%
Zone 15															
Denham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	2.0%
Iver/Iver Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	1.8%
Other Zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Buckinghamshire total	**31.6%**	**36.9%**	**43.7%**	**75.8%**	**82.2%**	**52.9%**	**46.4%**	**86.6%**	**83.8%**	**91.4%**	**91.6%**	**65.3%**	**72.6%**	**57.6%**	**23.2%**
Outside Buckinghamshire															
Banbury	0.6%	0.0%	0.0%	0.0%	0.0%	0.8%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Berkhamsted	0.0%	0.9%	7.6%	2.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	1.7%	0.1%	0.0%	0.0%
Bicester	2.5%	0.0%	0.0%	0.4%	0.7%	9.0%	0.0%	0.2%	0.0%	0.2%	0.8%	0.7%	0.0%	0.0%	1.5%
Hemel Hempstead	0.0%	1.4%	6.4%	2.6%	1.1%	1.5%	0.0%	0.0%	0.0%	0.1%	0.1%	12.7%	1.9%	0.0%	1.2%
Henley-on-Thames	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	1.5%	0.6%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Leighton Buzzard	0.1%	4.8%	1.1%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
London	0.3%	0.5%	0.3%	1.6%	0.6%	1.8%	0.1%	1.3%	2.2%	0.9%	1.6%	2.7%	3.7%	1.2%	8.3%
Luton/Dunstable	1.9%	3.6%	0.2%	0.1%	0.3%	0.0%	0.2%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.3%	0.0%
Maidenhead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.4%	0.0%	0.0%	0.0%	3.5%	0.3%
Milton Keynes/Bletchley	55.1%	19.9%	9.4%	9.0%	12.4%	6.6%	1.6%	1.8%	0.8%	0.8%	0.5%	1.9%	0.0%	0.5%	1.6%
Oxford	1.4%	0.4%	0.3%	0.9%	0.1%	9.9%	15.4%	1.1%	0.5%	1.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Reading	0.0%	0.0%	0.8%	0.2%	0.0%	0.0%	0.9%	1.0%	2.3%	0.8%	0.2%	0.0%	0.0%	4.1%	1.8%
Rickmansworth	0.2%	0.0%	0.0%	0.8%	0.0%	0.6%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	2.0%	0.0%	0.9%
Slough	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.5%	2.7%	0.9%	1.8%	0.1%	0.7%	16.2%	23.7%
Thame/Chinnor	0.0%	0.0%	0.0%	0.7%	0.1%	13.0%	22.5%	4.1%	0.0%	0.0%	0.0%	0.0%	0.9%	0.1%	0.0%
Tring	0.0%	1.0%	21.9%	2.6%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
Uxbridge	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.2%	0.1%	0.0%	0.0%	3.6%	4.3%	23.8%
Watford	1.6%	0.8%	1.4%	1.8%	0.3%	0.6%	0.2%	0.5%	1.0%	0.4%	0.1%	8.9%	8.3%	1.0%	4.1%
Elsewhere	4.3%	29.8%	6.8%	0.8%	1.8%	3.2%	10.3%	2.1%	2.9%	2.9%	3.1%	4.3%	6.2%	11.3%	9.2%
Outside sub-total	**68.4%**	**63.1%**	**56.3%**	**24.2%**	**17.8%**	**47.1%**	**53.6%**	**13.4%**	**16.2%**	**8.6%**	**8.4%**	**34.7%**	**27.4%**	**42.4%**	**76.8%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey February 2023 and Lichfields' analysis.

Table 5 - Base year 2024 comparison goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2024	125.33	135.38	64.23	140.03	178.18	145.51	114.79	125.37	206.60	173.13	139.08	197.71	253.77	161.62	112.42	2,273.18
Zone 1																
Buckingham	21.42	0.70	0.00	1.49	0.00	2.88	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.00	26.75
Winslow	1.37	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.05
Zone 2																
Other Zone 2	0.00	0.15	0.24	0.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85
Zone 4																
Wendover	0.57	1.73	0.00	2.23	0.04	0.00	0.00	0.00	0.00	0.00	0.04	0.42	0.00	0.00	0.00	5.04
Other Zone 4	0.00	0.00	0.56	1.03	0.22	0.00	0.00	0.21	0.00	0.05	0.00	0.13	0.00	0.00	0.00	2.20
Zone 5																
Aylesbury	11.09	26.10	24.31	82.34	132.56	53.70	30.93	22.61	3.25	4.87	0.98	9.32	3.07	7.02	1.30	413.44
Zone 6																
Other Zone 6	1.58	1.42	0.39	2.32	5.03	7.42	3.43	1.38	0.00	0.18	0.14	0.99	0.36	0.00	0.00	24.65
Zone 8																
Princes Risborough	0.00	3.63	0.00	0.72	0.81	0.72	1.59	15.83	0.00	0.78	0.00	0.36	0.00	0.00	0.00	24.45
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.37	1.68	0.06	0.17	0.00	0.00	0.00	0.00	0.00	2.29
Zone 9																
Marlow	0.00	1.68	0.00	0.00	0.00	0.18	0.46	0.29	29.19	2.34	0.23	1.95	3.25	0.79	0.70	41.07
Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	6.56	0.05	0.72	0.00	0.26	1.23	0.00	9.02
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.06	0.00	0.00	0.00	0.00	0.56
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.62	0.24	0.06	0.00	0.00	0.35	0.00	1.35
Zone 10/11																
High Wycombe	2.80	2.98	2.38	14.16	7.44	10.35	16.49	61.41	125.45	147.52	116.36	54.38	102.99	45.65	13.01	723.40
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.51	2.24	0.00	1.53	0.27	2.98	0.00	0.00	7.78
Zone 12																
Chesham	0.26	1.84	0.21	0.00	0.00	0.18	0.00	0.35	0.00	0.14	0.13	44.82	4.43	0.00	0.00	52.37
Great Missenden	0.00	0.78	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.19	5.47	0.42	0.00	0.00	7.05
Zone 13																
Amersham on the Hill	0.00	1.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.29	6.29	30.64	0.00	0.00	39.05
Amersham Old Town	0.51	0.88	0.00	1.02	0.00	0.00	0.00	1.88	0.73	0.32	1.20	3.75	6.79	0.98	0.00	18.05
Chalfont St Giles	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.97	0.00	0.00	5.54
Chalfont St Peter	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.42	0.20	0.00	5.00	0.65	0.00	6.37
Other Zone 13	0.00	0.00	0.00	0.32	0.00	1.32	0.00	0.05	0.00	0.00	0.00	0.16	1.16	0.00	0.00	3.02
Zone 14																
Beaconsfield New Town	0.00	3.53	0.00	0.00	0.22	0.00	0.00	1.91	2.45	0.37	5.18	0.76	10.29	14.45	0.70	39.85
Beaconsfield Old Town	0.00	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.33	0.96	0.16	1.74
Gerrards Cross	0.00	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.81	5.54	3.94	16.63
Burnham/Taplow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.73	0.13	0.16	0.00	0.83	11.34	0.56	14.75
Other Zone 14	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.55	0.00	0.00	0.00	3.67	0.80	5.16
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.06	2.23	2.79
Iver/Iver Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.14	0.41	2.05	2.67
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	0.67
Bucks sub-total	**39.60**	**49.99**	**28.09**	**106.20**	**146.48**	**77.01**	**53.27**	**108.56**	**173.12**	**158.27**	**127.47**	**129.06**	**184.22**	**93.09**	**26.13**	**1,500.57**
Outside Bucks																
Banbury	0.77	0.00	0.00	0.00	0.00	1.16	0.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	2.78
Berkhamsted	0.00	1.23	4.89	3.05	0.08	0.00	0.00	0.24	0.00	0.00	0.00	3.45	0.37	0.00	0.00	13.31
Bicester	3.13	0.00	0.00	0.50	1.32	13.08	0.00	0.26	0.00	0.38	1.16	1.38	0.00	0.00	1.73	22.94
Hemel Hempstead	0.00	1.93	4.11	3.66	1.89	2.12	0.00	0.00	0.06	0.12	0.09	25.07	4.78	0.00	1.32	45.16
Henley-on-Thames	0.00	0.00	0.00	0.17	0.00	0.15	1.69	0.80	0.72	0.00	0.00	0.00	0.00	0.00	0.00	3.53
Leighton Buzzard	0.06	6.47	0.73	0.38	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.93
London	0.34	0.66	0.19	2.22	1.14	2.65	0.17	1.64	4.52	1.57	2.26	5.38	9.39	1.90	9.36	43.39
Luton/Dunstable	2.43	4.84	0.10	0.12	0.45	0.00	0.18	0.00	0.22	0.00	0.00	0.34	0.00	0.48	0.05	9.21
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.17	0.70	0.00	0.00	0.00	5.69	0.39	12.94
Milton Keynes/Bletchley	69.12	26.93	6.05	12.63	22.10	9.66	1.81	2.24	1.68	1.36	0.73	3.67	0.00	0.74	1.82	160.56
Oxford	1.71	0.58	0.16	1.25	0.22	14.40	17.70	1.32	1.12	1.73	0.00	1.21	0.00	0.00	0.00	41.39
Reading	0.00	0.00	0.53	0.22	0.00	0.00	1.03	1.22	4.82	1.32	0.29	0.00	0.00	6.58	1.97	17.98
Rickmansworth	0.20	0.00	0.00	1.15	0.00	0.87	0.00	0.00	0.21	0.00	0.00	0.23	5.19	0.00	1.04	8.88
Slough	0.57	0.00	0.00	0.00	0.18	0.00	0.00	0.62	5.58	1.63	2.57	0.20	1.76	26.17	26.70	65.98
Thame/Chinnor	0.00	0.00	0.00	1.00	0.24	18.85	25.81	5.16	0.00	0.00	0.00	0.00	2.28	0.16	0.00	53.49
Tring	0.00	1.31	14.06	3.63	0.06	0.00	0.18	0.00	0.00	0.00	0.00	1.58	0.00	0.00	0.00	20.83
Uxbridge	0.00	0.00	0.00	0.17	0.00	0.00	0.19	0.00	0.32	0.20	0.00	0.00	9.16	6.95	26.75	43.74
Watford	2.03	1.14	0.92	2.57	0.50	0.87	0.28	0.65	2.13	0.76	0.21	17.63	20.96	1.58	4.61	56.84
Elsewhere	5.38	40.30	4.39	1.10	3.25	4.69	11.80	2.65	5.95	5.08	4.31	8.52	15.65	18.27	10.36	141.70
Outside Bucks sub-total	**85.73**	**85.39**	**36.15**	**33.83**	**31.70**	**68.49**	**61.51**	**16.81**	**33.49**	**14.86**	**11.62**	**68.66**	**69.55**	**68.53**	**86.30**	**772.61**
TOTAL	**125.33**	**135.38**	**64.23**	**140.03**	**178.18**	**145.51**	**114.79**	**125.37**	**206.60**	**173.13**	**139.08**	**197.71**	**253.77**	**161.62**	**112.42**	**2,273.18**

Source: Table 3 and Table 4

Table 6 - Future 2030 comparison goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2030	144.87	156.49	70.83	161.87	205.97	168.20	126.41	144.92	238.82	200.13	160.77	228.55	293.35	186.83	129.96	2,617.97
Zone 1																
Buckingham	24.76	0.81	0.00	1.73	0.00	3.32	0.00	0.00	0.31	0.00	0.00	0.00	0.00	0.00	0.00	30.92
Winslow	1.58	0.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.37
Zone 2																
Other Zone 2	0.00	0.17	0.27	0.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.97
Zone 4																
Wendover	0.66	2.00	0.00	2.58	0.05	0.00	0.00	0.00	0.00	0.00	0.05	0.49	0.00	0.00	0.00	5.83
Other Zone 4	0.00	0.00	0.61	1.19	0.26	0.00	0.00	0.24	0.00	0.06	0.00	0.15	0.00	0.00	0.00	2.51
Zone 5																
Aylesbury	12.82	30.17	26.81	95.18	153.23	62.08	34.06	26.13	3.75	5.63	1.13	10.77	3.55	8.11	1.50	474.92
Zone 6																
Other Zone 6	1.83	1.64	0.43	2.69	5.82	8.58	3.78	1.60	0.00	0.20	0.16	1.14	0.42	0.00	0.00	28.29
Zone 8																
Princes Risborough	0.00	4.20	0.00	0.84	0.94	0.83	1.75	18.30	0.00	0.90	0.00	0.41	0.00	0.00	0.00	28.18
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.95	0.07	0.20	0.00	0.00	0.00	0.00	0.00	2.62
Zone 9																
Marlow	0.00	1.94	0.00	0.00	0.00	0.21	0.51	0.34	33.75	2.71	0.26	2.25	3.75	0.92	0.81	47.44
Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	7.58	0.06	0.83	0.00	0.31	1.42	0.00	10.43
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.00	0.07	0.00	0.00	0.00	0.00	0.65
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.72	0.28	0.07	0.00	0.00	0.41	0.00	1.56
Zone 10/11																
High Wycombe	3.24	3.45	2.63	16.37	8.60	11.97	18.16	70.98	145.01	170.53	134.51	62.86	119.05	52.77	15.04	835.18
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.59	2.59	0.00	1.77	0.31	3.44	0.00	0.00	8.99
Zone 12																
Chesham	0.30	2.13	0.23	0.00	0.00	0.21	0.00	0.41	0.00	0.16	0.16	51.81	5.13	0.00	0.00	60.52
Great Missenden	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.22	6.32	0.49	0.00	0.00	8.14
Zone 13																
Amersham on the Hill	0.00	1.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.34	7.27	35.42	0.00	0.00	45.14
Amersham Old Town	0.59	1.02	0.00	1.18	0.00	0.00	0.00	2.17	0.84	0.37	1.38	4.34	7.84	1.13	0.00	20.86
Chalfont St Giles	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.74	0.00	0.00	6.40
Chalfont St Peter	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.49	0.23	0.00	5.78	0.75	0.00	7.37
Other Zone 13	0.00	0.00	0.00	0.37	0.00	1.53	0.00	0.06	0.00	0.00	0.00	0.19	1.34	0.00	0.00	3.50
Zone 14																
Beaconsfield New Town	0.00	4.08	0.00	0.00	0.25	0.00	0.00	2.21	2.84	0.42	5.98	0.88	11.90	16.71	0.81	46.07
Beaconsfield Old Town	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38	1.11	0.18	2.01
Gerrards Cross	0.00	1.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.72	6.40	4.56	19.22
Burnham/Taplow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00	0.15	0.18	0.00	0.95	13.10	0.65	17.05
Other Zone 14	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.63	0.00	0.00	0.00	4.24	0.92	5.97
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	0.07	2.58	3.22
Iver/Iver Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.16	0.48	2.37	3.08
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.77	0.77
Bucks sub-total	**45.78**	**57.79**	**30.97**	**122.77**	**169.33**	**89.02**	**58.66**	**125.49**	**200.11**	**182.95**	**147.35**	**149.18**	**212.95**	**107.61**	**30.20**	**1,730.17**
Outside Bucks																
Banbury	0.89	0.00	0.00	0.00	0.00	1.34	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	3.17
Berkhamsted	0.00	1.42	5.39	3.53	0.09	0.00	0.00	0.28	0.00	0.00	0.00	3.99	0.43	0.00	0.00	15.13
Bicester	3.62	0.00	0.00	0.58	1.52	15.12	0.00	0.31	0.00	0.44	1.35	1.59	0.00	0.00	2.00	26.52
Hemel Hempstead	0.00	2.23	4.53	4.23	2.18	2.45	0.00	0.00	0.07	0.14	0.11	28.98	5.53	0.00	1.53	51.99
Henley-on-Thames	0.00	0.00	0.00	0.20	0.00	0.17	1.86	0.92	0.83	0.00	0.00	0.00	0.00	0.00	0.00	3.99
Leighton Buzzard	0.07	7.48	0.81	0.44	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.13
London	0.39	0.76	0.21	2.57	1.31	3.06	0.18	1.90	5.22	1.82	2.62	6.22	10.86	2.20	10.82	50.14
Luton/Dunstable	2.80	5.59	0.11	0.13	0.52	0.00	0.19	0.00	0.25	0.00	0.00	0.40	0.00	0.56	0.06	10.63
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.13	0.81	0.00	0.00	0.00	6.58	0.45	14.96
Milton Keynes/Bletchley	79.90	31.13	6.68	14.60	25.54	11.17	1.99	2.59	1.95	1.57	0.84	4.24	0.00	0.86	2.11	185.17
Oxford	1.97	0.67	0.18	1.45	0.25	16.64	19.49	1.53	1.29	2.01	0.00	1.39	0.00	0.00	0.00	46.87
Reading	0.00	0.00	0.59	0.25	0.00	0.00	1.14	1.41	5.57	1.53	0.33	0.00	0.00	7.61	2.28	20.70
Rickmansworth	0.23	0.00	0.00	1.33	0.00	1.01	0.00	0.00	0.24	0.00	0.00	0.26	6.00	0.00	1.21	10.27
Slough	0.66	0.00	0.00	0.00	0.21	0.00	0.00	0.72	6.44	1.89	2.97	0.23	2.04	30.25	30.86	76.27
Thame/Chinnor	0.00	0.00	0.00	1.16	0.27	21.78	28.43	5.96	0.00	0.00	0.00	0.00	2.64	0.18	0.00	60.42
Tring	0.00	1.51	15.51	4.20	0.07	0.00	0.20	0.00	0.00	0.00	0.00	1.83	0.00	0.00	0.00	23.32
Uxbridge	0.00	0.00	0.00	0.19	0.00	0.00	0.21	0.00	0.37	0.23	0.00	0.00	10.59	8.03	30.93	50.55
Watford	2.34	1.31	1.02	2.97	0.58	1.00	0.31	0.75	2.46	0.88	0.24	20.37	24.23	1.82	5.33	65.64
Elsewhere	6.22	46.59	4.84	1.27	3.75	5.42	12.99	3.06	6.88	5.87	4.98	9.85	18.09	21.12	11.98	162.92
Outside Bucks sub-total	**99.10**	**98.70**	**39.86**	**39.10**	**36.65**	**79.18**	**67.74**	**19.43**	**38.71**	**17.18**	**13.43**	**79.36**	**80.40**	**79.21**	**99.76**	**887.80**
TOTAL	**144.87**	**156.49**	**70.83**	**161.87**	**205.97**	**168.20**	**126.41**	**144.92**	**238.82**	**200.13**	**160.77**	**228.55**	**293.35**	**186.83**	**129.96**	**2,617.97**

Source: Table 3 and Table 4

Table 7 - Future 2035 comparison goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2035	168.23	181.72	79.27	187.96	239.17	195.31	141.47	168.28	277.32	232.39	186.69	265.39	340.63	216.94	150.90	3,031.65
Zone 1																
Buckingham	28.75	0.94	0.00	2.01	0.00	3.86	0.00	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00	35.91
Winslow	1.84	0.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.75
Zone 2																
Other Zone 2	0.00	0.20	0.30	0.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.11
Zone 4																
Wendover	0.77	2.32	0.00	3.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06	0.57	0.00	0.00	0.00	6.77
Other Zone 4	0.00	0.00	0.69	1.38	0.30	0.00	0.00	0.28	0.00	0.07	0.00	0.17	0.00	0.00	0.00	2.89
Zone 5																
Aylesbury	14.89	35.03	30.00	110.53	177.93	72.08	38.12	30.34	4.36	6.54	1.31	12.51	4.13	9.42	1.74	548.92
Zone 6																
Other Zone 6	2.13	1.90	0.48	3.12	6.75	9.96	4.23	1.86	0.00	0.24	0.18	1.33	0.49	0.00	0.00	32.67
Zone 8																
Princes Risborough	0.00	4.88	0.00	0.97	1.09	0.97	1.96	21.25	0.00	1.05	0.00	0.48	0.00	0.00	0.00	32.64
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.45	2.26	0.08	0.23	0.00	0.00	0.00	0.00	0.00	3.03
Zone 9																
Marlow	0.00	2.26	0.00	0.00	0.00	0.25	0.57	0.39	39.18	3.14	0.31	2.62	4.36	1.06	0.94	55.07
Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.27	8.80	0.07	0.96	0.00	0.35	1.65	0.00	12.11
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	0.00	0.09	0.00	0.00	0.00	0.00	0.76
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.84	0.33	0.09	0.00	0.00	0.47	0.00	1.81
Zone 10/11																
High Wycombe	3.76	4.00	2.94	19.01	9.99	13.89	20.33	82.43	168.39	198.01	156.19	72.99	138.24	61.28	17.47	968.92
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.33	0.00	0.69	3.01	0.00	2.06	0.36	3.99	0.00	0.00	10.44
Zone 12																
Chesham	0.35	2.47	0.25	0.00	0.00	0.25	0.00	0.47	0.00	0.19	0.18	60.16	5.95	0.00	0.00	70.27
Great Missenden	0.00	1.05	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.00	0.25	7.34	0.57	0.00	0.00	9.46
Zone 13																
Amersham on the Hill	0.00	2.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.39	8.44	41.13	0.00	0.00	52.42
Amersham Old Town	0.69	1.18	0.00	1.37	0.00	0.00	0.00	2.52	0.98	0.43	1.61	5.04	9.11	1.31	0.00	24.23
Chalfont St Giles	0.00	0.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.67	0.00	0.00	7.43
Chalfont St Peter	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.57	0.26	0.00	6.72	0.87	0.00	8.55
Other Zone 13	0.00	0.00	0.00	0.43	0.00	1.78	0.00	0.07	0.00	0.00	0.00	0.22	1.56	0.00	0.00	4.06
Zone 14																
Beaconsfield New Town	0.00	4.74	0.00	0.00	0.29	0.00	0.00	2.56	3.29	0.49	6.95	1.02	13.81	19.40	0.94	53.49
Beaconsfield Old Town	0.00	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.44	1.29	0.21	2.33
Gerrards Cross	0.00	1.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.80	7.43	5.30	22.32
Burnham/Taplow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.32	0.18	0.21	0.00	1.11	15.22	0.76	19.79
Other Zone 14	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.73	0.00	0.00	0.00	4.92	1.07	6.93
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.66	0.08	3.00	3.74
Iver/Iver Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.18	0.55	2.76	3.58
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90	0.90
Bucks sub-total	**53.15**	**67.11**	**34.66**	**142.55**	**196.62**	**103.37**	**65.66**	**145.72**	**232.37**	**212.44**	**171.10**	**173.23**	**247.27**	**124.96**	**35.07**	**2,005.27**
Outside Bucks																
Banbury	1.03	0.00	0.00	0.00	0.00	1.55	0.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	3.65
Berkhamsted	0.00	1.65	6.03	4.09	0.11	0.00	0.00	0.33	0.00	0.00	0.00	4.64	0.50	0.00	0.00	17.34
Bicester	4.21	0.00	0.00	0.67	1.77	17.56	0.00	0.35	0.00	0.51	1.56	1.85	0.00	0.00	2.32	30.80
Hemel Hempstead	0.00	2.59	5.07	4.92	2.54	2.85	0.00	0.00	0.08	0.17	0.12	33.65	6.42	0.00	1.78	60.18
Henley-on-Thames	0.00	0.00	0.00	0.23	0.00	0.20	2.08	1.07	0.97	0.00	0.00	0.00	0.00	0.00	0.00	4.56
Leighton Buzzard	0.09	8.69	0.91	0.51	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.57
London	0.45	0.88	0.23	2.98	1.53	3.56	0.21	2.20	6.07	2.11	3.04	7.23	12.60	2.56	12.56	58.20
Luton/Dunstable	3.26	6.50	0.13	0.16	0.61	0.00	0.22	0.00	0.30	0.00	0.00	0.46	0.00	0.65	0.07	12.33
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.28	0.94	0.00	0.00	0.00	7.64	0.52	17.37
Milton Keynes/Bletchley	92.78	36.15	7.47	16.95	29.66	12.97	2.23	3.01	2.26	1.82	0.97	4.92	0.00	1.00	2.45	214.66
Oxford	2.29	0.78	0.20	1.68	0.29	19.32	21.82	1.77	1.50	2.33	0.00	1.62	0.00	0.00	0.00	53.60
Reading	0.00	0.00	0.66	0.29	0.00	0.00	1.27	1.64	6.46	1.77	0.38	0.00	0.00	8.83	2.65	23.97
Rickmansworth	0.27	0.00	0.00	1.54	0.00	1.17	0.00	0.00	0.28	0.00	0.00	0.30	6.96	0.00	1.40	11.93
Slough	0.77	0.00	0.00	0.00	0.25	0.00	0.00	0.84	7.48	2.19	3.45	0.26	2.37	35.12	35.84	88.57
Thame/Chinnor	0.00	0.00	0.00	1.35	0.32	25.30	31.82	6.92	0.00	0.00	0.00	0.00	3.06	0.21	0.00	68.97
Tring	0.00	1.76	17.35	4.88	0.08	0.00	0.22	0.00	0.00	0.00	0.00	2.13	0.00	0.00	0.00	26.42
Uxbridge	0.00	0.00	0.00	0.22	0.00	0.00	0.24	0.00	0.43	0.27	0.00	0.00	12.30	9.32	35.91	58.69
Watford	2.72	1.52	1.14	3.45	0.67	1.17	0.35	0.87	2.85	1.02	0.28	23.66	28.14	2.12	6.19	76.16
Elsewhere	7.22	54.10	5.42	1.47	4.36	6.29	14.54	3.55	7.99	6.82	5.78	11.44	21.01	24.53	13.91	188.43
Outside Bucks sub-total	**115.07**	**114.61**	**44.61**	**45.40**	**42.55**	**91.94**	**75.81**	**22.56**	**44.95**	**19.95**	**15.59**	**92.16**	**93.36**	**91.98**	**115.84**	**1,026.38**
TOTAL	**168.23**	**181.72**	**79.27**	**187.96**	**239.17**	**195.31**	**141.47**	**168.28**	**277.32**	**232.39**	**186.69**	**265.39**	**340.63**	**216.94**	**150.90**	**3,031.65**

Source: Table 3 and Table 4

Table 8 - Future 2040 comparison goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2040	195.76	211.46	88.71	218.72	278.32	227.28	158.99	195.82	322.71	270.43	217.24	308.82	396.38	252.45	175.60	3,518.71
Zone 1																
Buckingham	33.45	1.09	0.00	2.33	0.00	4.49	0.00	0.00	0.42	0.00	0.00	0.00	0.00	0.00	0.00	41.79
Winslow	2.14	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.20
Zone 2																
Other Zone 2	0.00	0.23	0.34	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.28
Zone 4																
Wendover	0.89	2.70	0.00	3.49	0.07	0.00	0.00	0.00	0.00	0.00	0.07	0.66	0.00	0.00	0.00	7.87
Other Zone 4	0.00	0.00	0.77	1.61	0.35	0.00	0.00	0.32	0.00	0.08	0.00	0.20	0.00	0.00	0.00	3.33
Zone 5																
Aylesbury	17.32	40.77	33.58	128.62	207.05	83.88	42.84	35.31	5.07	7.61	1.53	14.55	4.80	10.96	2.03	635.91
Zone 6																
Other Zone 6	2.47	2.22	0.54	3.63	7.86	11.59	4.75	2.16	0.00	0.28	0.21	1.55	0.57	0.00	0.00	37.83
Zone 8																
Princes Risborough	0.00	5.68	0.00	1.13	1.27	1.13	2.20	24.73	0.00	1.22	0.00	0.56	0.00	0.00	0.00	37.91
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.51	2.63	0.10	0.27	0.00	0.00	0.00	0.00	0.00	3.50
Zone 9																
Marlow	0.00	2.63	0.00	0.00	0.00	0.29	0.64	0.45	45.60	3.66	0.35	3.04	5.07	1.24	1.09	64.06
Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.31	10.24	0.09	1.12	0.00	0.41	1.92	0.00	14.09
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.78	0.00	0.10	0.00	0.00	0.00	0.00	0.88
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.98	0.38	0.10	0.00	0.00	0.55	0.00	2.10
Zone 10/11																
High Wycombe	4.38	4.66	3.29	22.12	11.63	16.17	22.85	95.92	195.95	230.42	181.75	84.94	160.86	71.31	20.33	1,126.57
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.39	0.00	0.80	3.50	0.00	2.39	0.42	4.65	0.00	0.00	12.15
Zone 12																
Chesham	0.40	2.87	0.28	0.00	0.00	0.29	0.00	0.55	0.00	0.22	0.21	70.01	6.93	0.00	0.00	81.76
Great Missenden	0.00	1.22	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.30	8.54	0.66	0.00	0.00	11.00
Zone 13																
Amersham on the Hill	0.00	2.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.46	9.82	47.87	0.00	0.00	61.00
Amersham Old Town	0.80	1.38	0.00	1.59	0.00	0.00	0.00	2.93	1.14	0.49	1.87	5.86	10.60	1.53	0.00	28.19
Chalfont St Giles	0.00	0.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.76	0.00	0.00	8.65
Chalfont St Peter	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.66	0.31	0.00	7.82	1.01	0.00	9.95
Other Zone 13	0.00	0.00	0.00	0.50	0.00	2.07	0.00	0.08	0.00	0.00	0.00	0.25	1.82	0.00	0.00	4.72
Zone 14																
Beaconsfield New Town	0.00	5.52	0.00	0.00	0.34	0.00	0.00	2.98	3.83	0.57	8.08	1.18	16.07	22.58	1.09	62.25
Beaconsfield Old Town	0.00	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	1.50	0.24	2.71
Gerrards Cross	0.00	2.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.08	8.65	6.16	25.98
Burnham/Taplow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.70	0.21	0.24	0.00	1.29	17.71	0.88	23.03
Other Zone 14	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.85	0.00	0.00	0.00	5.73	1.24	8.06
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.77	0.10	3.49	4.36
Iver/Iver Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.21	0.64	3.21	4.16
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.05	1.05
Bucks sub-total	**61.85**	**78.09**	**38.79**	**165.89**	**228.80**	**120.29**	**73.79**	**169.57**	**270.40**	**247.22**	**199.10**	**201.58**	**287.74**	**145.41**	**40.81**	**2,329.34**
Outside Bucks																
Banbury	1.20	0.00	0.00	0.00	0.00	1.81	0.93	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28	4.22
Berkhamsted	0.00	1.92	6.75	4.76	0.13	0.00	0.00	0.38	0.00	0.00	0.00	5.39	0.58	0.00	0.00	19.91
Bicester	4.89	0.00	0.00	0.78	2.06	20.44	0.00	0.41	0.00	0.59	1.82	2.15	0.00	0.00	2.70	35.84
Hemel Hempstead	0.00	3.01	5.67	5.72	2.95	3.31	0.00	0.00	0.10	0.19	0.15	39.16	7.47	0.00	2.07	69.80
Henley-on-Thames	0.00	0.00	0.00	0.27	0.00	0.24	2.34	1.25	1.13	0.00	0.00	0.00	0.00	0.00	0.00	5.22
Leighton Buzzard	0.10	10.11	1.01	0.59	0.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.26
London	0.52	1.03	0.26	3.47	1.77	4.14	0.23	2.56	7.06	2.46	3.54	8.41	14.67	2.98	14.62	67.71
Luton/Dunstable	3.79	7.56	0.14	0.18	0.71	0.00	0.24	0.00	0.34	0.00	0.00	0.53	0.00	0.75	0.08	14.33
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.63	1.09	0.00	0.00	0.00	8.89	0.60	20.21
Milton Keynes/Bletchley	107.96	42.07	8.36	19.73	34.52	15.10	2.51	3.50	2.63	2.12	1.13	5.73	0.00	1.16	2.85	249.37
Oxford	2.66	0.90	0.23	1.96	0.34	22.49	24.52	2.06	1.74	2.71	0.00	1.88	0.00	0.00	0.00	61.50
Reading	0.00	0.00	0.73	0.34	0.00	0.00	1.43	1.91	7.52	2.06	0.45	0.00	0.00	10.28	3.08	27.81
Rickmansworth	0.31	0.00	0.00	1.79	0.00	1.36	0.00	0.00	0.33	0.00	0.00	0.35	8.10	0.00	1.63	13.88
Slough	0.89	0.00	0.00	0.00	0.29	0.00	0.00	0.97	8.71	2.55	4.01	0.31	2.76	40.87	41.70	103.07
Thame/Chinnor	0.00	0.00	0.00	1.57	0.37	29.44	35.76	8.06	0.00	0.00	0.00	0.00	3.56	0.25	0.00	78.99
Tring	0.00	2.04	19.42	5.68	0.09	0.00	0.25	0.00	0.00	0.00	0.00	2.47	0.00	0.00	0.00	29.96
Uxbridge	0.00	0.00	0.00	0.26	0.00	0.00	0.27	0.00	0.50	0.31	0.00	0.00	14.31	10.85	41.79	68.28
Watford	3.17	1.77	1.28	4.02	0.78	1.36	0.39	1.01	3.32	1.19	0.32	27.53	32.75	2.47	7.21	88.56
Elsewhere	8.41	62.95	6.06	1.71	5.07	7.32	16.34	4.13	9.30	7.93	6.72	13.32	24.45	28.54	16.19	218.45
Outside Bucks sub-total	**133.91**	**133.37**	**49.92**	**52.83**	**49.52**	**106.99**	**85.20**	**26.26**	**52.30**	**23.21**	**18.14**	**107.24**	**108.64**	**107.04**	**134.80**	**1,189.37**
TOTAL	**195.76**	**211.46**	**88.71**	**218.72**	**278.32**	**227.28**	**158.99**	**195.82**	**322.71**	**270.43**	**217.24**	**308.82**	**396.38**	**252.45**	**175.60**	**3,518.71**

Source: Table 3 and Table 4

Table 9 - Future 2045 comparison goods shopping patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2040	233.89	252.65	101.76	261.33	332.53	271.55	182.76	233.97	385.57	323.11	259.56	368.98	473.60	301.62	209.81	4,192.68
Zone 1																
Buckingham	39.97	1.30	0.00	2.79	0.00	5.37	0.00	0.00	0.50	0.00	0.00	0.00	0.00	0.00	0.00	49.93
Winslow	2.55	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.82
Zone 2																
Other Zone 2	0.00	0.28	0.39	0.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.51
Zone 4																
Wendover	1.06	3.22	0.00	4.17	0.08	0.00	0.00	0.00	0.00	0.00	0.08	0.79	0.00	0.00	0.00	9.41
Other Zone 4	0.00	0.00	0.88	1.92	0.42	0.00	0.00	0.38	0.00	0.10	0.00	0.24	0.00	0.00	0.00	3.94
Zone 5																
Aylesbury	20.70	48.71	38.51	153.67	247.38	100.22	49.24	42.19	6.06	9.09	1.82	17.39	5.74	13.09	2.42	756.23
Zone 6																
Other Zone 6	2.96	2.65	0.62	4.34	9.39	13.85	5.46	2.58	0.00	0.33	0.25	1.85	0.68	0.00	0.00	44.95
Zone 8																
Princes Risborough	0.00	6.78	0.00	1.35	1.51	1.35	2.53	29.54	0.00	1.46	0.00	0.67	0.00	0.00	0.00	45.19
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.59	3.14	0.12	0.32	0.00	0.00	0.00	0.00	0.00	4.16
Zone 9																
Marlow	0.00	3.14	0.00	0.00	0.00	0.34	0.73	0.54	54.48	4.37	0.42	3.64	6.06	1.48	1.31	76.51
Bourne End	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.37	12.23	0.10	1.34	0.00	0.49	2.29	0.00	16.83
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.93	0.00	0.12	0.00	0.00	0.00	0.00	1.05
Other Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11	1.17	0.45	0.12	0.00	0.00	0.66	0.00	2.51
Zone 10/11																
High Wycombe	5.23	5.57	3.77	26.43	13.89	19.32	26.26	114.60	234.12	275.31	217.15	101.48	192.20	85.20	24.29	1,344.83
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.96	4.18	0.00	2.86	0.50	5.55	0.00	0.00	14.52
Zone 12																
Chesham	0.48	3.43	0.33	0.00	0.00	0.34	0.00	0.66	0.00	0.26	0.25	83.65	8.27	0.00	0.00	97.67
Great Missenden	0.00	1.46	0.00	0.00	0.00	0.00	0.00	0.34	0.00	0.00	0.35	10.21	0.79	0.00	0.00	13.15
Zone 13																
Amersham on the Hill	0.00	3.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.55	11.73	57.19	0.00	0.00	72.88
Amersham Old Town	0.96	1.65	0.00	1.90	0.00	0.00	0.00	3.50	1.36	0.59	2.23	7.01	12.66	1.83	0.00	33.68
Chalfont St Giles	0.00	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.27	0.00	0.00	10.33
Chalfont St Peter	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.79	0.37	0.00	9.34	1.20	0.00	11.89
Other Zone 13	0.00	0.00	0.00	0.60	0.00	2.47	0.00	0.10	0.00	0.00	0.00	0.30	2.17	0.00	0.00	5.64
Zone 14																
Beaconsfield New Town	0.00	6.59	0.00	0.00	0.40	0.00	0.00	3.56	4.58	0.68	9.66	1.41	19.20	26.97	1.30	74.37
Beaconsfield Old Town	0.00	0.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.61	1.79	0.29	3.24
Gerrards Cross	0.00	2.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.85	10.33	7.36	31.04
Burnham/Taplow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.23	0.25	0.29	0.00	1.54	21.16	1.05	27.52
Other Zone 14	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.00	1.02	0.00	0.00	0.00	6.84	1.48	9.63
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.92	0.12	4.17	5.21
Iver/Iver Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.25	0.77	3.83	4.98
Other Zone 15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.25	1.25
Bucks sub-total	**73.90**	**93.30**	**44.50**	**198.20**	**273.37**	**143.72**	**84.82**	**202.60**	**323.07**	**295.37**	**237.88**	**240.85**	**343.79**	**173.74**	**48.76**	**2,777.88**
Outside Bucks																
Banbury	1.43	0.00	0.00	0.00	0.00	2.16	1.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	5.00
Berkhamsted	0.00	2.29	7.74	5.69	0.15	0.00	0.00	0.46	0.00	0.00	0.00	6.44	0.69	0.00	0.00	23.46
Bicester	5.85	0.00	0.00	0.93	2.46	24.42	0.00	0.49	0.00	0.70	2.17	2.57	0.00	0.00	3.23	42.82
Hemel Hempstead	0.00	3.60	6.51	6.83	3.53	3.96	0.00	0.00	0.12	0.23	0.17	46.78	8.93	0.00	2.47	83.13
Henley-on-Thames	0.00	0.00	0.00	0.33	0.00	0.28	2.69	1.49	1.35	0.00	0.00	0.00	0.00	0.00	0.00	6.13
Leighton Buzzard	0.12	12.08	1.16	0.71	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.60
London	0.63	1.23	0.30	4.14	2.12	4.94	0.27	3.06	8.43	2.94	4.22	10.05	17.53	3.55	17.46	80.87
Luton/Dunstable	4.53	9.03	0.16	0.22	0.84	0.00	0.28	0.00	0.41	0.00	0.00	0.64	0.00	0.90	0.10	17.11
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.51	1.31	0.00	0.00	0.00	10.62	0.72	24.15
Milton Keynes/Bletchley	128.99	50.27	9.59	23.57	41.24	18.04	2.88	4.18	3.14	2.54	1.36	6.85	0.00	1.39	3.40	297.43
Oxford	3.18	1.08	0.26	2.34	0.40	26.87	28.18	2.47	2.08	3.24	0.00	2.25	0.00	0.00	0.00	72.35
Reading	0.00	0.00	0.84	0.41	0.00	0.00	1.64	2.28	8.99	2.46	0.53	0.00	0.00	12.28	3.68	33.12
Rickmansworth	0.38	0.00	0.00	2.14	0.00	1.63	0.00	0.00	0.39	0.00	0.00	0.42	9.68	0.00	1.95	16.58
Slough	1.07	0.00	0.00	0.00	0.34	0.00	0.00	1.16	10.40	3.05	4.79	0.37	3.29	48.83	49.83	123.14
Thame/Chinnor	0.00	0.00	0.00	1.87	0.44	35.17	41.10	9.62	0.00	0.00	0.00	0.00	4.25	0.29	0.00	92.76
Tring	0.00	2.44	22.28	6.78	0.11	0.00	0.29	0.00	0.00	0.00	0.00	2.96	0.00	0.00	0.00	34.86
Uxbridge	0.00	0.00	0.00	0.31	0.00	0.00	0.31	0.00	0.59	0.37	0.00	0.00	17.10	12.96	49.93	81.57
Watford	3.78	2.12	1.46	4.80	0.93	1.62	0.45	1.21	3.97	1.42	0.39	32.89	39.12	2.95	8.61	105.74
Elsewhere	10.04	75.22	6.95	2.05	6.06	8.75	18.79	4.94	11.11	9.48	8.03	15.91	29.21	34.10	19.34	259.98
Outside Bucks sub-total	**159.99**	**159.35**	**57.26**	**63.13**	**59.16**	**127.83**	**97.94**	**31.37**	**62.49**	**27.74**	**21.68**	**128.13**	**129.80**	**127.89**	**161.05**	**1,414.81**
TOTAL	**233.89**	**252.65**	**101.76**	**261.33**	**332.53**	**271.55**	**182.76**	**233.97**	**385.57**	**323.11**	**259.56**	**368.98**	**473.60**	**301.62**	**209.81**	**4,192.68**

Source: Table 3 and Table 4

Table 10 - Comparison goods floorspace in Buckinghamshire's main centres

Zone / Location		Gross floorspace (sq.m)	Sales floorspace (sq.m net)
Zone 1	Buckingham town centre	4,160	2,912
Buckingham	Comparison sales in food stores	n/a	1,314
	Sub-Total	**4,160**	**4,226**
Zone 1	Winslow town centre	845	592
Winslow	Comparison sales in food stores	n/a	15
	Sub Total	**845**	**607**
Zone 4	Wendover town centre	1,880	1,316
Wendover	Comparison sales in food stores	n/a	28
	Sub-Total	**1,880**	**1,344**
Zone 5	Aylesbury town centre	32,380	22,666
Aylesbury	Aylesbury Shopping Park	14,800	12,580
	The Vale Hundreds Retail Park	7,000	5,950
	Broadfields Retail Park	15,100	12,835
	Comparison sales in food stores	n/a	11,737
	Sub-Total	**69,280**	**65,768**
Zone 8	Princes Risborough town centre	3,830	2,681
Princes Risborough	Comparison sales in food stores	n/a	187
	Sub-Total	**3,830**	**2,868**
Zone 9	Marlow town centre	13,670	9,569
Marlow	Comparison sales in food stores	n/a	376
	Sub-Total	**13,670**	**9,945**
Zone 10 / 11	High Wycombe town centre	57,920	40,544
High Wycombe	Wycombe Retail Park	10,300	8,755
	Retail Warehouses London Road	6,500	5,525
	Retail Warehouses Knaves Beech	7,300	6,205
	Retail Warehouses Bellfield Road	4,500	3,825
	John Lewis / Next, Crest Road	26,900	22,865
	Comparison sales in food stores	n/a	7,700
	Sub Total	**113,420**	**95,419**
Zone 12	Chesham town centre	8,930	6,251
Chesham	Comparison sales in food stores	n/a	658
	Sub-Total	**8,930**	**6,909**
Zone 12	Great Missenden town centre	685	480
Great Missenden	Comparison sales in food stores	n/a	39
	Sub-Total	**685**	**519**
Zone 13	Amersham on the Hill town centre	8,320	5,824
Amersham	Amersham Old Town centre	2,634	1,844
	Comparison sales in food stores	n/a	1,039
	Sub-Total	**10,954**	**8,707**
Zone 14	Beaconsfield New town centre	10,810	7,567
Beaconsfield	Beaconsfield Old town centre	2,000	1,400
	Comparison sales in food stores	n/a	935
	Sub-Total	**12,810**	**9,902**
Zone 14	Gerrards Cross town centre	4,610	3,227
Gerrards Cross	Comparison sales in food stores	n/a	453
	Sub-Total	**4,610**	**3,680**
Zone 14	The Bishop Centre	3,400	2,890
Taplow	Comparison sales in food stores	n/a	1,569
	Sub-Total	**3,400**	**4,459**
TOTAL		**248,474**	**214,352**

Source: *Goad Plans 2022 and VOA.*

Table 11 - Summary of comparison goods expenditure 2024 to 2045 (£M)

Zone / Destination	2024	2030	2035	2040	2045
Available expenditure					
1 - Buckingham	26.75	30.92	35.91	41.79	49.93
1 - Winslow	2.05	2.37	2.75	3.20	3.82
2 - Buckinghamshire rural northeast	0.85	0.97	1.11	1.28	1.51
4 - Aylesbury southeast/Wendover	7.24	8.34	9.65	11.20	13.35
5 - Aylesbury urban	413.44	474.92	548.92	635.91	756.23
6 - Buckingham rural northwest	24.65	28.29	32.67	37.83	44.95
8 - Princes Risborough	26.73	30.80	35.67	41.41	49.36
9 - Marlow	52.00	60.08	69.74	81.13	96.91
10/11 High Wycombe	731.18	844.17	979.36	1,138.72	1,359.34
12 - Chesham	52.37	60.52	70.27	81.76	97.67
12 - Great Missenden	7.05	8.14	9.46	11.00	13.15
13 - Amersham/Chalfonts	72.03	83.27	96.69	112.51	134.43
14 - Beaconsfield	41.59	48.07	55.82	64.96	77.61
14 - Gerrards Cross	16.63	19.22	22.32	25.98	31.04
14 - Other Zone 14	19.91	23.01	26.72	31.09	37.15
15 - Denham/Iver	6.13	7.08	8.22	9.57	11.43
Total	**1,500.57**	**1,730.17**	**2,005.27**	**2,329.34**	**2,777.88**
Turnover of existing facilities					
1 - Buckingham	26.75	29.89	33.49	37.52	42.04
1 - Winslow	2.05	2.29	2.56	2.87	3.22
2 - Buckinghamshire rural northeast	0.85	0.95	1.06	1.19	1.33
4 - Aylesbury southeast/Wendover	7.24	8.08	9.06	10.15	11.37
5 - Aylesbury urban	413.44	461.89	517.51	579.82	649.64
6 - Buckingham rural northwest	24.65	27.54	30.86	34.57	38.73
8 - Princes Risborough	26.73	29.87	33.46	37.49	42.01
9 - Marlow	52.00	58.09	65.08	72.92	81.70
10/11 High Wycombe	731.18	816.87	915.23	1,025.43	1,148.91
12 - Chesham	52.37	58.50	65.55	73.44	82.29
12 - Great Missenden	7.05	7.87	8.82	9.88	11.07
13 - Amersham/Chalfonts	72.03	80.47	90.16	101.02	113.19
14 - Beaconsfield	41.59	46.46	52.06	58.32	65.35
14 - Gerrards Cross	16.63	18.58	20.82	23.32	26.13
14 - Other Zone 14	19.91	22.24	24.92	27.92	31.28
15 - Denham/Iver	6.13	6.84	7.67	8.59	9.62
Total	**1,500.57**	**1,676.43**	**1,878.30**	**2,104.47**	**2,357.87**
Surplus/deficit expenditure £M					
1 - Buckingham	0.00	1.04	2.42	4.27	7.89
1 - Winslow	0.00	0.08	0.19	0.33	0.60
2 - Buckinghamshire rural northeast	0.00	0.02	0.05	0.09	0.18
4 - Aylesbury southeast/Wendover	0.00	0.25	0.60	1.05	1.98
5 - Aylesbury urban	0.00	13.03	31.41	56.08	106.59
6 - Buckingham rural northwest	0.00	0.75	1.81	3.25	6.22
8 - Princes Risborough	0.00	0.93	2.21	3.92	7.35
9 - Marlow	0.00	1.99	4.66	8.21	15.21
10/11 High Wycombe	0.00	27.30	64.13	113.29	210.43
12 - Chesham	0.00	2.02	4.72	8.32	15.39
12 - Great Missenden	0.00	0.27	0.64	1.12	2.08
13 - Amersham/Chalfonts	0.00	2.79	6.52	11.49	21.24
14 - Beaconsfield	0.00	1.61	3.77	6.63	12.26
14 - Gerrards Cross	0.00	0.64	1.51	2.65	4.90
14 - Other Zone 14	0.00	0.77	1.80	3.18	5.87
15 - Denham/Iver	0.00	0.24	0.55	0.98	1.81
Total	**0.00**	**53.73**	**126.98**	**224.87**	**420.00**

Source: Tables 5 to 9

Table 12 - Comparison goods floorspace capacity up to 2045

Zone / Destination	2024	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£7,000	£7,820	£8,762	£9,817	£10,999
Floorspace projection (sq.m net)					
1 - Buckingham	0	133	276	435	717
1 - Winslow	0	10	21	33	55
2 - Buckinghamshire rural northeast	0	3	6	9	16
4 - Aylesbury southeast/Wendover	0	32	68	107	180
5 - Aylesbury urban	0	1,667	3,584	5,713	9,691
6 - Buckingham rural northwest	0	95	207	332	565
8 - Princes Risborough	0	119	252	399	668
9 - Marlow	0	254	532	837	1,383
10/11 High Wycombe	0	3,491	7,320	11,540	19,132
12 - Chesham	0	258	539	847	1,399
12 - Great Missenden	0	35	73	114	189
13 - Amersham/Chalfonts	0	357	744	1,170	1,931
14 - Beaconsfield	0	206	430	676	1,115
14 - Gerrards Cross	0	82	172	270	446
15 - Denham/Iver	0	99	206	323	534
Total	**0**	**6,840**	**14,428**	**22,806**	**38,020**
Floorspace Projection (sq.m gross)					
1 - Buckingham	0	189	395	621	1,025
1 - Winslow	0	14	30	48	78
2 - Buckinghamshire rural northeast	0	4	8	13	23
4 - Aylesbury southeast/Wendover	0	46	97	153	257
5 - Aylesbury urban	0	2,381	5,121	8,161	13,844
6 - Buckingham rural northwest	0	136	296	474	808
8 - Princes Risborough	0	170	360	570	954
9 - Marlow	0	363	759	1,195	1,975
10/11 High Wycombe	0	4,987	10,456	16,486	27,331
12 - Chesham	0	369	769	1,210	1,998
12 - Great Missenden	0	50	104	164	270
13 - Amersham/Chalfonts	0	510	1,063	1,672	2,759
14 - Beaconsfield	0	294	614	965	1,593
14 - Gerrards Cross	0	118	245	386	637
15 - Denham/Iver	0	141	294	462	762
Total	**0**	**9,772**	**20,612**	**32,580**	**54,315**

Source: Table 11

Appendix 4 Food/beverage capacity

Table 1 - Study area population projections

Zone	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	34,473	36,659	38,358	40,204	42,250
2 - Buckinghamshire rural northeast	36,644	38,968	40,773	42,736	44,910
3 - Tring	16,973	17,219	17,363	17,502	17,658
4 - Aylesbury southeast/Wendover	40,195	42,744	44,724	46,877	49,262
5 - Aylesbury urban	61,526	65,428	68,459	71,754	75,405
6 - Buckingham rural northwest	41,003	43,603	45,623	47,819	50,253
7 - Thame/Chinnor	31,449	31,860	32,130	32,524	32,883
8 - Princes Risborough	31,905	33,928	35,500	37,209	39,102
9 - Marlow	52,437	55,762	58,346	61,154	64,266
10 - High Wycombe west	60,894	64,756	67,756	71,017	74,631
11 - High Wycombe east	43,944	46,731	48,896	51,249	53,857
12 - Chesham/Great Missenden	52,203	55,514	58,086	60,881	63,979
13 - Amersham/Chalfonts	63,067	67,067	70,174	73,551	77,294
14 - Beaconsfield/Gerrards Cross	41,076	43,681	45,705	47,904	50,342
15 - Denham/Iver	31,660	33,668	35,228	36,923	38,802
Total	**639,449**	**677,588**	**707,120**	**739,305**	**774,894**

Sources:
Local Housing Need of 4,490 dpa using the latest standard method calculation assuming backlog demand
Experian population projections (March 2025) for Zones 3 and 7 outside Buckinghamshire

Table 2 - Food / beverage expenditure per person per annum (£)

	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	2,019	2,074	2,146	2,222	2,301
2 - Buckinghamshire rural northeast	2,014	2,069	2,141	2,217	2,295
3 - Tring	2,205	2,265	2,343	2,427	2,513
4 - Aylesbury southeast/Wendover	1,947	2,000	2,069	2,143	2,219
5 - Aylesbury urban	1,631	1,676	1,734	1,795	1,859
6 - Buckingham rural northwest	1,901	1,953	2,020	2,092	2,166
7 - Thame/Chinnor	2,019	2,074	2,146	2,222	2,301
8 - Princes Risborough	2,202	2,262	2,340	2,423	2,509
9 - Marlow	2,366	2,430	2,514	2,603	2,695
10 - High Wycombe west	1,739	1,786	1,848	1,913	1,981
11 - High Wycombe east	1,855	1,905	1,971	2,041	2,114
12 - Chesham/Great Missenden	2,246	2,308	2,387	2,472	2,560
13 - Amersham/Chalfonts	2,429	2,496	2,582	2,673	2,768
14 - Beaconsfield/Gerrards Cross	2,412	2,478	2,563	2,654	2,748
15 - Denham/Iver	2,140	2,199	2,274	2,355	2,439

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Table 3 - Total food / beverage expenditure (£m)

	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	69.61	76.04	82.31	89.33	97.21
2 - Buckinghamshire rural northeast	73.81	80.63	87.28	94.72	103.08
3 - Tring	37.43	39.01	40.69	42.47	44.37
4 - Aylesbury southeast/Wendover	78.27	85.51	92.55	100.45	109.31
5 - Aylesbury urban	100.38	109.66	118.69	128.82	140.18
6 - Buckingham rural northwest	77.95	85.16	92.17	100.04	108.86
7 - Thame/Chinnor	63.50	66.09	68.94	72.27	75.66
8 - Princes Risborough	70.26	76.76	83.08	90.17	98.12
9 - Marlow	124.04	135.51	146.67	159.19	173.23
10 - High Wycombe west	105.88	115.67	125.20	135.88	147.86
11 - High Wycombe east	81.51	89.04	96.38	104.60	113.83
12 - Chesham/Great Missenden	117.27	128.11	138.67	150.50	163.77
13 - Amersham/Chalfonts	153.22	167.38	181.18	196.64	213.98
14 - Beaconsfield/Gerrards Cross	99.07	108.22	117.14	127.14	138.35
15 - Denham/Iver	67.76	74.02	80.12	86.96	94.63
Total	**1,319.96**	**1,436.80**	**1,551.06**	**1,679.17**	**1,822.42**

Source: Tables 1 and 2

Table 4 - Base year food / beverage market shares (%)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Zone 1															
Buckingham	36.8%	0.0%	0.6%	0.7%	0.4%	2.1%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.6%	0.0%
Winslow	13.8%	0.8%	0.0%	0.0%	1.5%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 1	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2															
Other Zone 2	3.9%	10.4%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wendover	0.0%	0.0%	3.6%	11.8%	0.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%
Other Zone 4	0.0%	2.4%	1.9%	25.1%	9.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.4%	1.6%	0.3%	0.0%	0.0%
Zone 5															
Aylesbury town centre	2.3%	6.2%	2.2%	23.4%	50.1%	15.8%	8.4%	10.1%	1.1%	0.0%	0.0%	1.7%	2.6%	0.5%	0.0%
Aylesbury other	1.9%	2.5%	2.0%	5.4%	14.2%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Zone 6															
Other Zone 6	0.0%	0.0%	0.0%	1.2%	5.7%	29.1%	5.7%	1.4%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Zone 8															
Princes Risborough	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%	0.0%	15.1%	0.0%	0.5%	0.8%	0.0%	0.0%	0.0%	0.0%
Other Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	15.4%	0.4%	3.1%	0.0%	0.9%	0.3%	0.0%	0.2%
Zone 9															
Marlow	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.6%	11.0%	44.5%	5.9%	13.7%	0.4%	2.5%	1.9%	2.4%
Bourne End	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.6%	0.7%	0.0%	0.5%	0.0%	0.0%	0.0%
Flackwell Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Other Zone 9	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.2%	1.1%	11.9%	2.7%	0.8%	1.1%	0.1%	1.8%	0.6%
Zone 10/11															
High Wycombe town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.0%	4.9%	44.0%	35.0%	3.4%	3.9%	1.6%	0.0%
Hazlemere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	5.4%	0.0%	0.3%	0.0%	0.0%
Other High Wycombe	0.0%	0.0%	0.0%	3.0%	0.5%	0.0%	0.0%	1.4%	2.3%	10.4%	6.1%	1.6%	0.0%	1.4%	0.6%
Zone 12															
Chesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.8%	0.4%	20.0%	1.1%	0.0%	0.0%
Great Missenden	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	3.0%	6.3%	1.7%	0.0%	0.0%
Other Zone 12	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	2.0%	0.3%	4.9%	0.4%	0.0%	0.0%
Zone 13															
Amersham on the Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.4%	1.6%	4.9%	13.9%	0.0%	0.0%
Amersham Old Town	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.8%	0.2%	0.0%	0.6%	3.0%	7.3%	19.0%	0.0%	1.7%
Chalfont St Giles	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	1.7%
Chalfont St Peter	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	4.9%	0.6%	1.2%
Other Zone 13	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	5.9%	1.3%	0.7%	4.8%	2.7%	10.3%	5.5%	0.0%
Zone 14															
Beaconsfield New Town	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.7%	6.5%	1.2%	4.0%	12.5%	6.8%
Beaconsfield Old Town	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	3.4%	5.3%	2.1%	6.1%	16.1%	2.6%
Gerrards Cross	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	8.3%	10.9%	5.0%
Burnham/Taplow	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%	3.5%
Other Zone 14	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%	0.0%	2.2%	0.0%	13.3%	9.0%
Zone 15															
Denham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.3%
Iver	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%
Other Zone 15	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.5%	0.0%	0.0%	3.0%	8.7%
Buckinghamshire total	**70.9%**	**26.5%**	**16.2%**	**72.6%**	**85.6%**	**49.7%**	**19.3%**	**77.5%**	**86.8%**	**78.0%**	**89.3%**	**67.0%**	**82.4%**	**75.9%**	**53.0%**
Outside Buckinghamshire															
Berkhamsted	0.0%	1.7%	2.5%	2.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%
Bicester	2.5%	0.7%	0.0%	0.0%	0.4%	1.8%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brackley	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hemel Hempstead	0.0%	0.0%	2.0%	2.5%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	5.1%	0.0%	0.0%	0.0%
Henley-on-Thames	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	2.8%	0.0%	1.3%	1.6%	0.3%	0.0%	0.0%	0.6%	0.0%
Leighton Buzzard	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
London	0.0%	0.0%	7.9%	0.0%	2.4%	2.8%	1.1%	7.3%	2.7%	5.2%	4.2%	9.1%	6.9%	5.4%	8.5%
Maidenhead	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	1.9%	0.4%	0.0%	0.0%	0.0%	3.6%	2.8%
Milton Keynes/Bletchley	11.6%	22.4%	3.3%	6.3%	2.1%	4.7%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Oxford	1.0%	0.0%	0.0%	0.0%	0.0%	14.2%	14.7%	1.2%	0.4%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Rickmansworth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.1%	4.3%	0.0%	0.0%
Slough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	4.3%
Thame/Chinnor	0.0%	0.0%	0.0%	2.7%	1.1%	21.6%	42.8%	8.1%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Tring	0.0%	15.0%	54.5%	9.8%	1.1%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	4.2%	0.3%	0.0%	0.0%
Uxbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	1.4%	9.2%
Watford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	1.2%	5.8%	1.2%	1.9%	0.0%
Elsewhere	13.4%	27.0%	13.5%	4.1%	3.9%	5.2%	15.7%	4.1%	6.9%	10.4%	2.7%	5.2%	4.9%	7.2%	22.2%
Outside sub-total	**29.1%**	**73.5%**	**83.8%**	**27.4%**	**14.4%**	**50.3%**	**80.7%**	**22.5%**	**13.2%**	**22.0%**	**10.7%**	**33.0%**	**17.6%**	**24.1%**	**47.0%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey February 2023 and Lichfields' analysis.

Table 5 - Base year 2024 food / beverage expenditure patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2024	69.61	73.81	37.43	78.27	100.38	77.95	63.50	70.26	124.04	105.88	81.51	117.27	153.22	99.07	67.76	1,319.96
Zone 1																
Buckingham	25.59	0.00	0.24	0.55	0.36	1.67	0.00	0.00	0.00	0.38	0.00	0.00	0.00	0.55	0.00	29.34
Winslow	9.59	0.60	0.00	0.00	1.49	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.85
Other Zone 1	3.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.77
Zone 2																
Other Zone 2	2.69	7.69	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.40	0.00	0.00	0.00	12.79
Zone 4																
Wendover	0.00	0.00	1.34	9.24	0.76	0.16	0.00	0.00	0.00	0.00	0.00	2.86	0.00	0.00	0.00	14.36
Other Zone 4	0.00	1.81	0.72	19.64	9.03	0.00	0.00	0.39	0.00	0.00	0.32	1.84	0.46	0.00	0.00	34.21
Zone 5																
Aylesbury town centre	1.62	4.58	0.84	18.29	50.27	12.28	5.32	7.12	1.40	0.00	0.00	1.95	4.00	0.45	0.00	108.12
Aylesbury other	1.35	1.84	0.73	4.25	14.27	1.38	0.00	0.00	0.00	0.00	0.00	0.00	0.47	0.00	0.00	24.30
Zone 6																
Other Zone 6	0.00	0.00	0.00	0.97	5.72	22.67	3.60	0.96	0.00	0.00	0.00	0.79	0.00	0.00	0.00	34.70
Zone 8																
Princes Risborough	0.00	0.00	0.00	0.00	0.71	0.39	0.00	10.58	0.00	0.57	0.69	0.00	0.00	0.00	0.00	12.94
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	2.26	10.83	0.46	3.28	0.00	1.08	0.46	0.00	0.15	18.52
Zone 9																
Marlow	0.00	0.00	0.00	0.00	1.61	0.00	0.40	7.76	55.20	6.28	11.14	0.46	3.90	1.84	1.63	90.22
Bourne End	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.67	0.77	0.00	0.58	0.00	0.00	0.00	12.40
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.97	0.00	0.69	0.00	0.00	0.00	0.00	4.66
Other Zone 9	0.00	0.54	0.00	0.00	0.00	0.00	0.13	0.76	14.81	2.87	0.65	1.32	0.15	1.78	0.38	23.38
Zone 10/11																
High Wycombe town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.42	6.03	46.60	28.51	3.95	6.05	1.57	0.00	101.13
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	4.41	0.00	0.46	0.00	0.00	5.44
Other High Wycombe	0.00	0.00	0.00	2.36	0.46	0.00	0.00	0.96	2.81	11.05	5.01	1.82	0.00	1.37	0.38	26.21
Zone 12																
Chesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.00	0.81	0.32	23.44	1.73	0.00	0.00	26.70
Great Missenden	0.00	1.84	0.00	0.00	0.00	0.00	0.00	1.56	0.00	0.00	2.45	7.41	2.57	0.00	0.00	15.83
Other Zone 12	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.39	0.00	2.14	0.22	5.74	0.61	0.00	0.00	9.35
Zone 13																
Amersham on the Hill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.91	0.38	1.29	5.78	21.26	0.00	0.00	30.62
Amersham Old Town	0.00	0.00	0.00	0.97	0.00	0.00	0.53	0.17	0.00	0.64	2.44	8.58	29.16	0.00	1.18	43.69
Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.55	0.00	1.16	4.70
Chalfont St Peter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	7.46	0.55	0.80	8.99
Other Zone 13	0.00	0.00	0.24	0.00	0.00	0.00	0.00	4.12	1.60	0.77	3.90	3.18	15.78	5.49	0.00	35.09
Zone 14																
Beaconsfield New Town	0.00	0.00	0.73	0.00	0.00	0.00	0.00	0.00	1.37	0.76	5.30	1.40	6.20	12.39	4.61	32.76
Beaconsfield Old Town	0.00	0.62	0.00	0.00	0.00	0.00	0.00	0.00	7.29	3.56	4.35	2.48	9.37	15.97	1.77	45.41
Gerrards Cross	0.00	0.00	0.00	0.00	1.22	0.00	0.00	0.00	0.00	0.00	0.69	0.00	12.68	10.83	3.41	28.83
Burnham/Taplow	2.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.78	2.34	10.28
Other Zone 14	2.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.81	0.00	2.56	0.00	13.17	6.07	24.95
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.45	0.85	1.30
Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.26	5.26
Other Zone 15	0.00	0.00	0.00	0.55	0.00	0.00	0.00	0.00	0.00	0.18	0.44	0.00	0.00	2.96	5.93	10.05
Bucks sub-total	**49.32**	**19.53**	**6.07**	**56.82**	**85.90**	**38.72**	**12.25**	**54.42**	**107.70**	**82.62**	**72.81**	**78.60**	**126.32**	**75.14**	**35.92**	**902.15**
Outside Bucks																
Berkhamsted	0.00	1.28	0.95	1.57	0.82	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	8.62
Bicester	1.71	0.54	0.00	0.00	0.36	1.38	2.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.25
Brackley	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53
Hemel Hempstead	0.00	0.00	0.75	1.93	1.09	0.00	0.00	0.00	0.00	0.00	0.44	6.02	0.00	0.00	0.00	10.22
Henley-on-Thames	0.00	0.00	0.00	0.00	1.25	0.00	1.79	0.00	1.60	1.72	0.24	0.00	0.00	0.60	0.00	7.20
Leighton Buzzard	0.00	4.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.97
London	0.00	0.00	2.95	0.00	2.42	2.21	0.72	5.10	3.37	5.46	3.44	10.67	10.50	5.40	5.73	57.97
Maidenhead	0.00	0.00	0.00	0.00	0.36	0.00	0.00	0.00	2.37	0.38	0.00	0.00	0.00	3.62	1.91	8.64
Milton Keynes/Bletchley	8.04	16.51	1.24	4.95	2.09	3.67	0.00	0.00	0.00	1.17	0.00	0.00	0.00	0.00	0.00	37.66
Oxford	0.69	0.00	0.00	0.00	0.00	11.08	9.33	0.83	0.46	0.00	0.93	0.00	0.00	0.00	0.00	23.31
Rickmansworth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.44	0.16	6.55	0.00	0.00	7.15
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.97	2.90	6.87
Thame/Chinnor	0.00	0.00	0.00	2.10	1.07	16.82	27.15	5.67	0.00	0.99	0.00	0.00	0.00	0.00	0.00	53.81
Tring	0.00	11.05	20.40	7.70	1.12	0.00	0.00	1.38	0.00	0.00	0.00	4.91	0.46	0.00	0.00	47.01
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.34	0.00	0.00	0.00	1.37	6.23	8.94
Watford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.17	0.99	6.79	1.88	1.85	0.00	12.68
Elsewhere	9.32	19.93	5.07	3.20	3.90	4.07	10.00	2.86	8.55	11.02	2.24	6.12	7.52	7.12	15.07	115.99
Outside Bucks sub-total	**20.29**	**54.28**	**31.35**	**21.45**	**14.48**	**39.23**	**51.25**	**15.84**	**16.34**	**23.26**	**8.70**	**38.67**	**26.90**	**23.92**	**31.84**	**417.80**
TOTAL	**69.61**	**73.81**	**37.43**	**78.27**	**100.38**	**77.95**	**63.50**	**70.26**	**124.04**	**105.88**	**81.51**	**117.27**	**153.22**	**99.07**	**67.76**	**1,319.96**

Source: Table 3 and Table 4

Table 6 - Future 2030 food / beverage expendiutre patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2030	76.04	80.63	39.01	85.51	109.66	85.16	66.09	76.76	135.51	115.67	89.04	128.11	167.38	108.22	74.02	1,436.80
Zone 1																
Buckingham	27.95	0.00	0.25	0.60	0.39	1.83	0.00	0.00	0.00	0.42	0.00	0.00	0.00	0.60	0.00	32.04
Winslow	10.48	0.66	0.00	0.00	1.63	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.95
Other Zone 1	4.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.12
Zone 2																
Other Zone 2	2.94	8.40	1.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.53	0.00	0.00	0.00	13.92
Zone 4																
Wendover	0.00	0.00	1.40	10.09	0.83	0.18	0.00	0.00	0.00	0.00	0.00	3.13	0.00	0.00	0.00	15.62
Other Zone 4	0.00	1.97	0.75	21.46	9.87	0.00	0.00	0.43	0.00	0.00	0.35	2.01	0.50	0.00	0.00	37.34
Zone 5																
Aylesbury town centre	1.77	5.00	0.87	19.98	54.91	13.42	5.54	7.78	1.53	0.00	0.00	2.13	4.37	0.49	0.00	117.80
Aylesbury other	1.48	2.01	0.76	4.64	15.59	1.51	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	26.51
Zone 6																
Other Zone 6	0.00	0.00	0.00	1.06	6.25	24.76	3.75	1.05	0.00	0.00	0.00	0.86	0.00	0.00	0.00	37.73
Zone 8																
Princes Risborough	0.00	0.00	0.00	0.00	0.78	0.43	0.00	11.56	0.00	0.62	0.75	0.00	0.00	0.00	0.00	14.14
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	2.36	11.84	0.50	3.58	0.00	1.18	0.50	0.00	0.17	20.12
Zone 9																
Marlow	0.00	0.00	0.00	0.00	1.76	0.00	0.42	8.48	60.31	6.86	12.17	0.50	4.26	2.01	1.78	98.53
Bourne End	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.65	0.84	0.00	0.63	0.00	0.00	0.00	13.55
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.34	0.00	0.75	0.00	0.00	0.00	0.00	5.09
Other Zone 9	0.00	0.59	0.00	0.00	0.00	0.00	0.13	0.83	16.18	3.14	0.71	1.44	0.17	1.94	0.41	25.54
Zone 10/11																
High Wycombe town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.20	6.59	50.91	31.15	4.32	6.61	1.71	0.00	110.48
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	4.82	0.00	0.50	0.00	0.00	5.94
Other High Wycombe	0.00	0.00	0.00	2.58	0.50	0.00	0.00	1.05	3.07	12.07	5.47	1.99	0.00	1.50	0.41	28.64
Zone 12																
Chesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43	0.00	0.89	0.35	25.60	1.89	0.00	0.00	29.16
Great Missenden	0.00	2.01	0.00	0.00	0.00	0.00	0.00	1.70	0.00	0.00	2.67	8.09	2.81	0.00	0.00	17.29
Other Zone 12	0.00	0.00	0.25	0.00	0.00	0.00	0.00	0.43	0.00	2.34	0.25	6.27	0.67	0.00	0.00	10.20
Zone 13																
Amersham on the Hill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.09	0.42	1.41	6.31	23.22	0.00	0.00	33.45
Amersham Old Town	0.00	0.00	0.00	1.06	0.00	0.00	0.55	0.19	0.00	0.70	2.67	9.38	31.86	0.00	1.29	47.70
Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.87	0.00	1.27	5.14
Chalfont St Peter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.00	0.00	8.15	0.60	0.88	9.83
Other Zone 13	0.00	0.00	0.25	0.00	0.00	0.00	0.00	4.51	1.75	0.84	4.26	3.48	17.24	6.00	0.00	38.33
Zone 14																
Beaconsfield New Town	0.00	0.00	0.76	0.00	0.00	0.00	0.00	0.00	1.50	0.83	5.79	1.53	6.77	13.53	5.03	35.75
Beaconsfield Old Town	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.00	7.96	3.89	4.75	2.71	10.23	17.45	1.93	49.60
Gerrards Cross	0.00	0.00	0.00	0.00	1.33	0.00	0.00	0.00	0.00	0.00	0.75	0.00	13.86	11.83	3.72	31.49
Burnham/Taplow	2.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.32	2.56	11.23
Other Zone 14	2.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.89	0.00	2.80	0.00	14.39	6.63	27.25
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.93	1.42
Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.74	5.74
Other Zone 15	0.00	0.00	0.00	0.60	0.00	0.00	0.00	0.00	0.00	0.20	0.48	0.00	0.00	3.23	6.48	10.98
Bucks sub-total	**53.88**	**21.34**	**6.33**	**62.07**	**93.84**	**42.30**	**12.75**	**59.45**	**117.65**	**90.26**	**79.54**	**85.87**	**137.99**	**82.09**	**39.24**	**984.61**
Outside Bucks																
Berkhamsted	0.00	1.40	0.99	1.72	0.89	0.00	0.00	0.00	0.00	0.00	0.00	4.37	0.00	0.00	0.00	9.37
Bicester	1.87	0.59	0.00	0.00	0.39	1.51	2.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.71
Brackley	0.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58
Hemel Hempstead	0.00	0.00	0.78	2.11	1.20	0.00	0.00	0.00	0.00	0.00	0.48	6.58	0.00	0.00	0.00	11.13
Henley-on-Thames	0.00	0.00	0.00	0.00	1.37	0.00	1.86	0.00	1.74	1.88	0.26	0.00	0.00	0.66	0.00	7.77
Leighton Buzzard	0.00	5.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.42
London	0.00	0.00	3.07	0.00	2.65	2.42	0.74	5.58	3.68	5.97	3.75	11.66	11.47	5.90	6.26	63.14
Maidenhead	0.00	0.00	0.00	0.00	0.39	0.00	0.00	0.00	2.59	0.42	0.00	0.00	0.00	3.95	2.09	9.44
Milton Keynes/Bletchley	8.78	18.03	1.29	5.40	2.28	4.01	0.00	0.00	0.00	1.28	0.00	0.00	0.00	0.00	0.00	41.08
Oxford	0.75	0.00	0.00	0.00	0.00	12.11	9.71	0.91	0.50	0.00	1.01	0.00	0.00	0.00	0.00	24.99
Rickmansworth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	0.18	7.15	0.00	0.00	7.81
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.34	3.16	7.50
Thame/Chinnor	0.00	0.00	0.00	2.30	1.17	18.37	28.26	6.19	0.00	1.09	0.00	0.00	0.00	0.00	0.00	57.38
Tring	0.00	12.08	21.26	8.41	1.22	0.00	0.00	1.50	0.00	0.00	0.00	5.37	0.50	0.00	0.00	50.33
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.46	0.00	0.00	0.00	1.50	6.81	9.76
Watford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.28	1.08	7.41	2.05	2.02	0.00	13.85
Elsewhere	10.19	21.77	5.28	3.50	4.26	4.44	10.41	3.12	9.35	12.03	2.45	6.68	8.22	7.78	16.47	125.94
Outside Bucks sub-total	**22.16**	**59.29**	**32.68**	**23.44**	**15.81**	**42.85**	**53.33**	**17.31**	**17.85**	**25.41**	**9.50**	**42.24**	**29.39**	**26.14**	**34.78**	**452.20**
TOTAL	**76.04**	**80.63**	**39.01**	**85.51**	**109.66**	**85.16**	**66.09**	**76.76**	**135.51**	**115.67**	**89.04**	**128.11**	**167.38**	**108.22**	**74.02**	**1,436.80**

Source: Table 3 and Table 4

Table 7 - Future 2035 food / beverage expendiutre patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2035	82.31	87.28	40.69	92.55	118.69	92.17	68.94	83.08	146.67	125.20	96.38	138.67	181.18	117.14	80.12	1,551.06
Zone 1																
Buckingham	30.25	0.00	0.26	0.65	0.42	1.98	0.00	0.00	0.00	0.45	0.00	0.00	0.00	0.65	0.00	34.67
Winslow	11.34	0.71	0.00	0.00	1.77	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.01
Other Zone 1	4.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.46
Zone 2																
Other Zone 2	3.18	9.10	1.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.65	0.00	0.00	0.00	15.02
Zone 4																
Wendover	0.00	0.00	1.46	10.92	0.90	0.19	0.00	0.00	0.00	0.00	0.00	3.39	0.00	0.00	0.00	16.85
Other Zone 4	0.00	2.14	0.78	23.23	10.68	0.00	0.00	0.46	0.00	0.00	0.38	2.17	0.54	0.00	0.00	40.38
Zone 5																
Aylesbury town centre	1.91	5.42	0.91	21.63	59.44	14.52	5.78	8.42	1.66	0.00	0.00	2.31	4.73	0.53	0.00	127.25
Aylesbury other	1.60	2.18	0.79	5.02	16.88	1.63	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	28.66
Zone 6																
Other Zone 6	0.00	0.00	0.00	1.15	6.76	26.80	3.91	1.13	0.00	0.00	0.00	0.93	0.00	0.00	0.00	40.69
Zone 8																
Princes Risborough	0.00	0.00	0.00	0.00	0.84	0.47	0.00	12.51	0.00	0.67	0.81	0.00	0.00	0.00	0.00	15.30
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	2.46	12.81	0.54	3.88	0.00	1.27	0.54	0.00	0.18	21.68
Zone 9																
Marlow	0.00	0.00	0.00	0.00	1.90	0.00	0.44	9.18	65.27	7.43	13.17	0.54	4.61	2.18	1.92	106.64
Bourne End	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.61	0.91	0.00	0.68	0.00	0.00	0.00	14.66
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.70	0.00	0.81	0.00	0.00	0.00	0.00	5.51
Other Zone 9	0.00	0.64	0.00	0.00	0.00	0.00	0.14	0.90	17.51	3.40	0.76	1.56	0.18	2.10	0.45	27.64
Zone 10/11																
High Wycombe town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.95	7.13	55.10	33.71	4.67	7.15	1.85	0.00	119.58
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	5.22	0.00	0.54	0.00	0.00	6.43
Other High Wycombe	0.00	0.00	0.00	2.79	0.54	0.00	0.00	1.13	3.32	13.06	5.92	2.16	0.00	1.62	0.45	31.00
Zone 12																
Chesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.96	0.38	27.71	2.05	0.00	0.00	31.57
Great Missenden	0.00	2.18	0.00	0.00	0.00	0.00	0.00	1.84	0.00	0.00	2.89	8.76	3.04	0.00	0.00	18.72
Other Zone 12	0.00	0.00	0.26	0.00	0.00	0.00	0.00	0.46	0.00	2.53	0.27	6.78	0.72	0.00	0.00	11.03
Zone 13																
Amersham on the Hill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.26	0.45	1.53	6.83	25.13	0.00	0.00	36.21
Amersham Old Town	0.00	0.00	0.00	1.15	0.00	0.00	0.58	0.20	0.00	0.76	2.89	10.15	34.49	0.00	1.40	51.60
Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.19	0.00	1.37	5.56
Chalfont St Peter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.00	8.82	0.65	0.95	10.64
Other Zone 13	0.00	0.00	0.26	0.00	0.00	0.00	0.00	4.88	1.90	0.91	4.61	3.76	18.66	6.49	0.00	41.47
Zone 14																
Beaconsfield New Town	0.00	0.00	0.79	0.00	0.00	0.00	0.00	0.00	1.62	0.90	6.27	1.65	7.33	14.65	5.45	38.66
Beaconsfield Old Town	0.00	0.73	0.00	0.00	0.00	0.00	0.00	0.00	8.62	4.21	5.14	2.93	11.08	18.89	2.09	53.69
Gerrards Cross	0.00	0.00	0.00	0.00	1.44	0.00	0.00	0.00	0.00	0.00	0.81	0.00	15.00	12.81	4.03	34.09
Burnham/Taplow	2.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.84	2.77	12.16
Other Zone 14	2.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.96	0.00	3.03	0.00	15.57	7.18	29.50
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53	1.01	1.54
Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.22	6.22
Other Zone 15	0.00	0.00	0.00	0.65	0.00	0.00	0.00	0.00	0.00	0.22	0.52	0.00	0.00	3.50	7.01	11.89
Bucks sub-total	**58.32**	**23.10**	**6.60**	**67.19**	**101.57**	**45.79**	**13.30**	**64.35**	**127.35**	**97.69**	**86.09**	**92.94**	**149.36**	**88.85**	**42.47**	**1,064.98**
Outside Bucks																
Berkhamsted	0.00	1.51	1.04	1.86	0.96	0.00	0.00	0.00	0.00	0.00	0.00	4.73	0.00	0.00	0.00	10.10
Bicester	2.02	0.64	0.00	0.00	0.42	1.63	2.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.17
Brackley	0.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62
Hemel Hempstead	0.00	0.00	0.81	2.28	1.29	0.00	0.00	0.00	0.00	0.00	0.52	7.12	0.00	0.00	0.00	12.02
Henley-on-Thames	0.00	0.00	0.00	0.00	1.48	0.00	1.94	0.00	1.89	2.03	0.28	0.00	0.00	0.71	0.00	8.34
Leighton Buzzard	0.00	5.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.87
London	0.00	0.00	3.21	0.00	2.87	2.61	0.78	6.04	3.98	6.46	4.06	12.62	12.41	6.38	6.77	68.19
Maidenhead	0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.00	2.80	0.45	0.00	0.00	0.00	4.28	2.26	10.22
Milton Keynes/Bletchley	9.51	19.52	1.35	5.85	2.47	4.34	0.00	0.00	0.00	1.38	0.00	0.00	0.00	0.00	0.00	44.42
Oxford	0.81	0.00	0.00	0.00	0.00	13.10	10.13	0.99	0.54	0.00	1.09	0.00	0.00	0.00	0.00	26.67
Rickmansworth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.19	7.74	0.00	0.00	8.45
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.69	3.43	8.12
Thame/Chinnor	0.00	0.00	0.00	2.49	1.27	19.89	29.48	6.70	0.00	1.18	0.00	0.00	0.00	0.00	0.00	61.00
Tring	0.00	13.07	22.17	9.10	1.32	0.00	0.00	1.63	0.00	0.00	0.00	5.81	0.54	0.00	0.00	53.64
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.58	0.00	0.00	0.00	1.62	7.37	10.57
Watford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.38	1.17	8.03	2.22	2.19	0.00	14.99
Elsewhere	11.02	23.56	5.51	3.79	4.61	4.81	10.86	3.38	10.12	13.02	2.65	7.23	8.90	8.42	17.82	135.70
Outside Bucks sub-total	**23.99**	**64.18**	**34.09**	**25.37**	**17.12**	**46.38**	**55.64**	**18.73**	**19.33**	**27.50**	**10.29**	**45.72**	**31.81**	**28.29**	**37.65**	**486.08**
TOTAL	**82.31**	**87.28**	**40.69**	**92.55**	**118.69**	**92.17**	**68.94**	**83.08**	**146.67**	**125.20**	**96.38**	**138.67**	**181.18**	**117.14**	**80.12**	**1,551.06**

Source: Table 3 and Table 4

Table 8 - Future 2040 food / beverage expendiutre patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2040	89.33	94.72	42.47	100.45	128.82	100.04	72.27	90.17	159.19	135.88	104.60	150.50	196.64	127.14	86.96	1,679.17
Zone 1																
Buckingham	32.84	0.00	0.27	0.71	0.46	2.15	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.71	0.00	37.61
Winslow	12.31	0.77	0.00	0.00	1.92	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.21
Other Zone 1	4.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.84
Zone 2																
Other Zone 2	3.45	9.87	1.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.80	0.00	0.00	0.00	16.26
Zone 4																
Wendover	0.00	0.00	1.52	11.85	0.97	0.21	0.00	0.00	0.00	0.00	0.00	3.67	0.00	0.00	0.00	18.23
Other Zone 4	0.00	2.32	0.81	25.21	11.59	0.00	0.00	0.50	0.00	0.00	0.41	2.36	0.59	0.00	0.00	43.80
Zone 5																
Aylesbury town centre	2.08	5.88	0.95	23.47	64.51	15.76	6.06	9.14	1.80	0.00	0.00	2.50	5.14	0.57	0.00	137.86
Aylesbury other	1.73	2.37	0.83	5.45	18.32	1.77	0.00	0.00	0.00	0.00	0.00	0.00	0.61	0.00	0.00	31.08
Zone 6																
Other Zone 6	0.00	0.00	0.00	1.24	7.34	29.09	4.10	1.23	0.00	0.00	0.00	1.01	0.00	0.00	0.00	44.01
Zone 8																
Princes Risborough	0.00	0.00	0.00	0.00	0.92	0.51	0.00	13.58	0.00	0.73	0.88	0.00	0.00	0.00	0.00	16.61
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	2.58	13.90	0.59	4.21	0.00	1.38	0.59	0.00	0.20	23.44
Zone 9																
Marlow	0.00	0.00	0.00	0.00	2.06	0.00	0.46	9.96	70.84	8.06	14.29	0.59	5.00	2.36	2.09	115.72
Bourne End	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.69	0.99	0.00	0.74	0.00	0.00	0.00	15.92
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.10	0.00	0.88	0.00	0.00	0.00	0.00	5.98
Other Zone 9	0.00	0.70	0.00	0.00	0.00	0.00	0.15	0.97	19.00	3.69	0.83	1.69	0.20	2.28	0.49	29.99
Zone 10/11																
High Wycombe town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.80	7.74	59.80	36.59	5.07	7.76	2.01	0.00	129.78
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73	5.66	0.00	0.59	0.00	0.00	6.98
Other High Wycombe	0.00	0.00	0.00	3.03	0.59	0.00	0.00	1.23	3.61	14.18	6.42	2.34	0.00	1.76	0.49	33.64
Zone 12																
Chesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	1.04	0.41	30.08	2.22	0.00	0.00	34.26
Great Missenden	0.00	2.37	0.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	3.14	9.51	3.30	0.00	0.00	20.31
Other Zone 12	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.50	0.00	2.75	0.29	7.36	0.79	0.00	0.00	11.96
Zone 13																
Amersham on the Hill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.45	0.49	1.66	7.41	27.28	0.00	0.00	39.30
Amersham Old Town	0.00	0.00	0.00	1.24	0.00	0.00	0.60	0.22	0.00	0.83	3.13	11.01	37.43	0.00	1.52	55.99
Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.55	0.00	1.49	6.04
Chalfont St Peter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	9.57	0.71	1.03	11.54
Other Zone 13	0.00	0.00	0.27	0.00	0.00	0.00	0.00	5.29	2.06	0.99	5.01	4.08	20.25	7.04	0.00	45.00
Zone 14																
Beaconsfield New Town	0.00	0.00	0.83	0.00	0.00	0.00	0.00	0.00	1.76	0.98	6.80	1.80	7.96	15.90	5.91	41.93
Beaconsfield Old Town	0.00	0.80	0.00	0.00	0.00	0.00	0.00	0.00	9.35	4.57	5.58	3.18	12.02	20.50	2.27	58.27
Gerrards Cross	0.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	0.00	0.88	0.00	16.28	13.90	4.38	37.00
Burnham/Taplow	2.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.42	3.00	13.20
Other Zone 14	2.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	1.04	0.00	3.29	0.00	16.90	7.79	32.01
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	1.10	1.67
Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.75	6.75
Other Zone 15	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.24	0.56	0.00	0.00	3.79	7.61	12.90
Bucks sub-total	**63.29**	**25.07**	**6.89**	**72.92**	**110.24**	**49.70**	**13.94**	**69.84**	**138.21**	**106.03**	**93.44**	**100.88**	**162.11**	**96.43**	**46.09**	**1,155.09**
Outside Bucks																
Berkhamsted	0.00	1.64	1.08	2.02	1.05	0.00	0.00	0.00	0.00	0.00	0.00	5.13	0.00	0.00	0.00	10.92
Bicester	2.19	0.70	0.00	0.00	0.46	1.77	2.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.70
Brackley	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68
Hemel Hempstead	0.00	0.00	0.85	2.47	1.40	0.00	0.00	0.00	0.00	0.00	0.56	7.72	0.00	0.00	0.00	13.01
Henley-on-Thames	0.00	0.00	0.00	0.00	1.61	0.00	2.03	0.00	2.05	2.21	0.31	0.00	0.00	0.78	0.00	8.98
Leighton Buzzard	0.00	6.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.37
London	0.00	0.00	3.35	0.00	3.11	2.84	0.81	6.55	4.32	7.01	4.41	13.70	13.47	6.93	7.35	73.85
Maidenhead	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.00	3.04	0.49	0.00	0.00	0.00	4.64	2.46	11.09
Milton Keynes/Bletchley	10.32	21.18	1.40	6.35	2.68	4.71	0.00	0.00	0.00	1.50	0.00	0.00	0.00	0.00	0.00	48.15
Oxford	0.88	0.00	0.00	0.00	0.00	14.22	10.62	1.07	0.59	0.00	1.19	0.00	0.00	0.00	0.00	28.57
Rickmansworth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.21	8.40	0.00	0.00	9.17
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.09	3.72	8.81
Thame/Chinnor	0.00	0.00	0.00	2.70	1.38	21.58	30.90	7.27	0.00	1.28	0.00	0.00	0.00	0.00	0.00	65.11
Tring	0.00	14.19	23.14	9.88	1.43	0.00	0.00	1.77	0.00	0.00	0.00	6.30	0.59	0.00	0.00	57.30
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.72	0.00	0.00	0.00	1.76	8.00	11.47
Watford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.50	1.27	8.71	2.41	2.38	0.00	16.27
Elsewhere	11.97	25.57	5.75	4.11	5.00	5.22	11.38	3.67	10.98	14.14	2.87	7.85	9.66	9.13	19.34	146.65
Outside Bucks sub-total	**26.04**	**69.66**	**35.58**	**27.53**	**18.58**	**50.34**	**58.32**	**20.33**	**20.97**	**29.85**	**11.17**	**49.63**	**34.53**	**30.70**	**40.86**	**524.08**
TOTAL	**89.33**	**94.72**	**42.47**	**100.45**	**128.82**	**100.04**	**72.27**	**90.17**	**159.19**	**135.88**	**104.60**	**150.50**	**196.64**	**127.14**	**86.96**	**1,679.17**

Source: Table 3 and Table 4

Table 9 - Future 2045 food / beverage expendiutre patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2045	97.21	103.08	44.37	109.31	140.18	108.86	75.66	98.12	173.23	147.86	113.83	163.77	213.98	138.35	94.63	1,822.42
Zone 1																
Buckingham	35.73	0.00	0.28	0.77	0.50	2.34	0.00	0.00	0.00	0.53	0.00	0.00	0.00	0.77	0.00	40.92
Winslow	13.39	0.84	0.00	0.00	2.09	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.55
Other Zone 1	5.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.27
Zone 2																
Other Zone 2	3.76	10.74	1.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.95	0.00	0.00	0.00	17.64
Zone 4																
Wendover	0.00	0.00	1.59	12.90	1.06	0.23	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	19.77
Other Zone 4	0.00	2.52	0.85	27.43	12.62	0.00	0.00	0.55	0.00	0.00	0.45	2.56	0.64	0.00	0.00	47.62
Zone 5																
Aylesbury town centre	2.26	6.40	0.99	25.54	70.20	17.15	6.34	9.94	1.96	0.00	0.00	2.72	5.59	0.62	0.00	149.72
Aylesbury other	1.89	2.57	0.87	5.93	19.93	1.93	0.00	0.00	0.00	0.00	0.00	0.00	0.66	0.00	0.00	33.78
Zone 6																
Other Zone 6	0.00	0.00	0.00	1.35	7.99	31.66	4.29	1.34	0.00	0.00	0.00	1.10	0.00	0.00	0.00	47.73
Zone 8																
Princes Risborough	0.00	0.00	0.00	0.00	1.00	0.55	0.00	14.78	0.00	0.79	0.96	0.00	0.00	0.00	0.00	18.07
Other Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	2.70	15.13	0.64	4.58	0.00	1.51	0.64	0.00	0.21	25.40
Zone 9																
Marlow	0.00	0.00	0.00	0.00	2.25	0.00	0.48	10.84	77.09	8.77	15.55	0.64	5.44	2.57	2.27	125.91
Bourne End	0.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.90	1.08	0.00	0.81	0.00	0.00	0.00	17.32
Flackwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.55	0.00	0.96	0.00	0.00	0.00	0.00	6.50
Other Zone 9	0.00	0.76	0.00	0.00	0.00	0.00	0.15	1.06	20.68	4.01	0.90	1.84	0.22	2.48	0.53	32.63
Zone 10/11																
High Wycombe town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.76	8.43	65.08	39.82	5.52	8.45	2.19	0.00	141.23
Hazlemere	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79	6.16	0.00	0.64	0.00	0.00	7.59
Other High Wycombe	0.00	0.00	0.00	3.30	0.64	0.00	0.00	1.34	3.93	15.43	6.99	2.55	0.00	1.91	0.53	36.61
Zone 12																
Chesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.55	0.00	1.13	0.45	32.73	2.42	0.00	0.00	37.28
Great Missenden	0.00	2.57	0.00	0.00	0.00	0.00	0.00	2.18	0.00	0.00	3.42	10.35	3.59	0.00	0.00	22.10
Other Zone 12	0.00	0.00	0.28	0.00	0.00	0.00	0.00	0.55	0.00	2.99	0.31	8.01	0.85	0.00	0.00	13.01
Zone 13																
Amersham on the Hill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.67	0.53	1.81	8.07	29.68	0.00	0.00	42.76
Amersham Old Town	0.00	0.00	0.00	1.35	0.00	0.00	0.63	0.24	0.00	0.90	3.41	11.99	40.73	0.00	1.65	60.90
Chalfont St Giles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.95	0.00	1.62	6.57
Chalfont St Peter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.00	10.41	0.77	1.12	12.56
Other Zone 13	0.00	0.00	0.28	0.00	0.00	0.00	0.00	5.76	2.24	1.08	5.45	4.44	22.04	7.67	0.00	48.96
Zone 14																
Beaconsfield New Town	0.00	0.00	0.87	0.00	0.00	0.00	0.00	0.00	1.92	1.07	7.40	1.95	8.66	17.30	6.43	45.59
Beaconsfield Old Town	0.00	0.87	0.00	0.00	0.00	0.00	0.00	0.00	10.18	4.98	6.07	3.46	13.08	22.30	2.47	63.41
Gerrards Cross	0.00	0.00	0.00	0.00	1.70	0.00	0.00	0.00	0.00	0.00	0.96	0.00	17.71	15.13	4.76	40.26
Burnham/Taplow	3.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.07	3.27	14.36
Other Zone 14	3.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	1.13	0.00	3.58	0.00	18.39	8.48	34.84
Zone 15																
Denham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	1.19	1.82
Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.34	7.34
Other Zone 15	0.00	0.00	0.00	0.77	0.00	0.00	0.00	0.00	0.00	0.26	0.61	0.00	0.00	4.13	8.28	14.04
Bucks sub-total	**68.88**	**27.28**	**7.20**	**79.35**	**119.96**	**54.08**	**14.60**	**76.00**	**150.40**	**115.38**	**101.68**	**109.77**	**176.40**	**104.94**	**50.16**	**1,256.08**
Outside Bucks																
Berkhamsted	0.00	1.79	1.13	2.20	1.14	0.00	0.00	0.00	0.00	0.00	0.00	5.58	0.00	0.00	0.00	11.83
Bicester	2.38	0.76	0.00	0.00	0.50	1.93	2.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.27
Brackley	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.74
Hemel Hempstead	0.00	0.00	0.88	2.69	1.53	0.00	0.00	0.00	0.00	0.00	0.61	8.41	0.00	0.00	0.00	14.12
Henley-on-Thames	0.00	0.00	0.00	0.00	1.75	0.00	2.13	0.00	2.23	2.40	0.33	0.00	0.00	0.84	0.00	9.68
Leighton Buzzard	0.00	6.93	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.93
London	0.00	0.00	3.50	0.00	3.39	3.09	0.85	7.13	4.70	7.63	4.80	14.91	14.66	7.54	8.00	80.18
Maidenhead	0.00	0.00	0.00	0.00	0.50	0.00	0.00	0.00	3.31	0.53	0.00	0.00	0.00	5.05	2.67	12.06
Milton Keynes/Bletchley	11.23	23.05	1.47	6.91	2.92	5.12	0.00	0.00	0.00	1.63	0.00	0.00	0.00	0.00	0.00	52.34
Oxford	0.96	0.00	0.00	0.00	0.00	15.48	11.11	1.16	0.64	0.00	1.29	0.00	0.00	0.00	0.00	30.65
Rickmansworth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.61	0.23	9.15	0.00	0.00	9.98
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.54	4.05	9.59
Thame/Chinnor	0.00	0.00	0.00	2.94	1.50	23.49	32.35	7.91	0.00	1.39	0.00	0.00	0.00	0.00	0.00	69.58
Tring	0.00	15.44	24.18	10.75	1.56	0.00	0.00	1.92	0.00	0.00	0.00	6.86	0.64	0.00	0.00	61.35
Uxbridge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.87	0.00	0.00	0.00	1.91	8.70	12.48
Watford	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.63	1.38	9.48	2.62	2.59	0.00	17.70
Elsewhere	13.02	27.83	6.01	4.47	5.44	5.68	11.91	3.99	11.95	15.38	3.13	8.54	10.51	9.94	21.05	158.86
Outside Bucks sub-total	**28.33**	**75.80**	**37.17**	**29.96**	**20.22**	**54.78**	**61.06**	**22.12**	**22.82**	**32.48**	**12.15**	**54.00**	**37.57**	**33.41**	**44.47**	**566.34**
TOTAL	**97.21**	**103.08**	**44.37**	**109.31**	**140.18**	**108.86**	**75.66**	**98.12**	**173.23**	**147.86**	**113.83**	**163.77**	**213.98**	**138.35**	**94.63**	**1,822.42**

Source: Table 3 and Table 4

Table 10 - Food beverage floorspace in Buckinghamshire's main centres

Zone / Location	Gross floorspace (sq.m)
Zone 1 - Buckingham town centre	3,290
Zone 1 - Winslow town centre	692
Zone 4 - Wensover town centre	1,770
Zone 5 - Aylesbury town centre	10,270
Zone 5 - Aylesbury retail parks	1,103
Zone 8 - Princes Risborough town centre	1,760
Zone 9 - Marlow town centre	8,600
Zone 10 / 11 - High Wycombe town centre	16,210
Zone 10 / 11 - High Wycombe retail parks	1,695
Zone 12 - Chesham town centre	4,140
Zone 12 - Great Missenden town centre	942
Zone 13 - Amersham Old Town	2,287
Zone 13 - Amersham on the Hill	3,970
Zone 14 - Beaconsfield New Town	3,410
Zone 14 - Beaconsfield Old Town	3,120
Zone 14 - Gerrards Cross town centre	3,270
Zone 14 - The Bishop Centre	774
TOTAL	**67,303**

Source: Goad Plans and VOA.

Table 11 - Summary of food / beverage expenditure 2024 to 2045 (£M)

Zone / Destination	2024	2030	2035	2040	2045
Available expenditure					
1 - Buckingham	29.34	32.04	34.67	37.61	40.92
1 - Winslow	11.85	12.95	14.01	15.21	16.55
1- Other Zone 1	3.77	4.12	4.46	4.84	5.27
2 - Buckinghamshire rural northeast	12.79	13.92	15.02	16.26	17.64
4 - Aylesbury southeast/Wendover	48.57	52.96	57.24	62.03	67.40
5 - Aylesbury urban	132.42	144.31	155.91	168.93	183.50
6 - Buckingham rural northwest	34.70	37.73	40.69	44.01	47.73
8 - Princes Risborough	31.46	34.25	36.98	40.05	43.47
9 - Marlow	130.66	142.71	154.45	167.60	182.36
10/11 High Wycombe	132.78	145.05	157.01	170.40	185.43
12 - Chesham	26.70	29.16	31.57	34.26	37.28
12 - Great Missenden	15.83	17.29	18.72	20.31	22.10
12 - Other Zone 12	9.35	10.20	11.03	11.96	13.01
13 - Amersham/Chalfonts	123.10	134.44	145.48	157.86	228.59
14 - Beaconsfield	78.16	85.35	92.35	100.20	109.00
14 - Gerrards Cross	28.83	31.49	34.09	37.00	40.26
14 - Other Zone 14	35.23	38.49	41.66	45.21	49.20
15 - Denham/Iver	16.61	18.15	19.64	21.32	23.20
Total	**902.15**	**984.61**	**1,064.98**	**1,155.09**	**1,312.92**
Turnover of existing facilities					
1 - Buckingham	29.34	29.46	29.60	29.75	29.90
1 - Winslow	11.85	11.90	11.96	12.02	12.08
1- Other Zone 1	3.77	3.79	3.81	3.83	3.85
2 - Buckinghamshire rural northeast	12.79	12.84	12.90	12.97	13.03
4 - Aylesbury southeast/Wendover	48.57	48.76	49.01	49.25	49.50
5 - Aylesbury urban	132.42	132.95	133.62	134.29	134.96
6 - Buckingham rural northwest	34.70	34.84	35.02	35.19	35.37
8 - Princes Risborough	31.46	31.59	31.75	31.91	32.07
9 - Marlow	130.66	131.18	131.84	132.50	133.16
10/11 High Wycombe	132.78	133.31	133.98	134.65	135.33
12 - Chesham	26.70	26.80	26.94	27.07	27.21
12 - Great Missenden	15.83	15.89	15.97	16.05	16.13
12 - Other Zone 12	9.35	9.39	9.43	9.48	9.53
13 - Amersham/Chalfonts	123.10	123.59	124.21	124.83	125.46
14 - Beaconsfield	78.16	78.48	78.87	79.27	79.66
14 - Gerrards Cross	28.83	28.94	29.09	29.23	29.38
14 - Other Zone 14	35.23	35.37	35.55	35.73	35.91
15 - Denham/Iver	16.61	16.68	16.76	16.85	16.93
Total	**902.15**	**905.77**	**910.30**	**914.86**	**919.45**
Surplus/deficit expenditure £M					
1 - Buckingham	0.00	2.58	5.06	7.86	11.02
1 - Winslow	0.00	1.05	2.06	3.19	4.47
1- Other Zone 1	0.00	0.33	0.65	1.02	1.42
2 - Buckinghamshire rural northeast	0.00	1.08	2.12	3.29	4.61
4 - Aylesbury southeast/Wendover	0.00	4.19	8.23	12.77	17.89
5 - Aylesbury urban	0.00	11.36	22.30	34.65	48.55
6 - Buckingham rural northwest	0.00	2.88	5.67	8.82	12.36
8 - Princes Risborough	0.00	2.67	5.24	8.14	11.41
9 - Marlow	0.00	11.53	22.61	35.10	49.19
10/11 High Wycombe	0.00	11.74	23.03	35.75	50.10
12 - Chesham	0.00	2.36	4.63	7.19	10.07
12 - Great Missenden	0.00	1.40	2.74	4.26	5.97
12 - Other Zone 12	0.00	0.81	1.60	2.48	3.48
13 - Amersham/Chalfonts	0.00	10.85	21.27	33.03	103.13
14 - Beaconsfield	0.00	6.88	13.48	20.94	29.34
14 - Gerrards Cross	0.00	2.55	5.00	7.76	10.88
14 - Other Zone 14	0.00	3.12	6.11	9.49	13.29
15 - Denham/Iver	0.00	1.47	2.88	4.47	6.27
Total	**0.00**	**78.84**	**154.68**	**240.23**	**393.47**

Source: Tables 5 to 9

Table 12 - Food / beverage floorspace capacity up to 2045

Zone / Destination	2024	2030	2035	2040	2041
Turnover density new floorspace (£ per sq.m)	£9,000	£9,036	£9,081	£9,127	£9,173
Floorspace projection (sq.m gross)					
1 - Buckingham	0	323	630	973	1,357
1 - Winslow	0	116	226	350	488
2 - Buckinghamshire rural northeast	0	120	234	361	503
4 - Aylesbury southeast/Wendover	0	464	906	1,399	1,951
5 - Aylesbury urban	0	1,257	2,455	3,796	5,292
6 - Buckingham rural northwest	0	319	624	966	1,347
8 - Princes Risborough	0	295	577	892	1,244
9 - Marlow	0	1,276	2,489	3,846	5,363
10/11 High Wycombe	0	1,299	2,535	3,917	5,462
12 - Chesham	0	351	686	1,060	1,477
12 - Great Missenden	0	155	302	467	651
13 - Amersham/Chalfonts	0	1,200	2,342	3,619	11,244
14 - Beaconsfield	0	1,106	2,158	3,333	4,648
14 - Gerrards Cross	0	282	550	850	1,186
15 - Denham/Iver	0	163	317	490	683
Total	**0**	**8,725**	**17,033**	**26,321**	**42,897**

Source: Table 11

Appendix 5 Leisure/entertainment capacity

Table 1 - Study area population projections

Zone	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	34,473	36,659	38,358	40,204	42,250
2 - Buckinghamshire rural northeast	36,644	38,968	40,773	42,736	44,910
3 - Tring	16,973	17,219	17,363	17,502	17,658
4 - Aylesbury southeast/Wendover	40,195	42,744	44,724	46,877	49,262
5 - Aylesbury urban	61,526	65,428	68,459	71,754	75,405
6 - Buckingham rural northwest	41,003	43,603	45,623	47,819	50,253
7 - Thame/Chinnor	31,449	31,860	32,130	32,524	32,883
8 - Princes Risborough	31,905	33,928	35,500	37,209	39,102
9 - Marlow	52,437	55,762	58,346	61,154	64,266
10 - High Wycombe west	60,894	64,756	67,756	71,017	74,631
11 - High Wycombe east	43,944	46,731	48,896	51,249	53,857
12 - Chesham/Great Missenden	52,203	55,514	58,086	60,881	63,979
13 - Amersham/Chalfonts	63,067	67,067	70,174	73,551	77,294
14 - Beaconsfield/Gerrards Cross	41,076	43,681	45,705	47,904	50,342
15 - Denham/Iver	31,660	33,668	35,228	36,923	38,802
Total	**639,449**	**677,588**	**707,120**	**739,305**	**774,894**

Sources:
Local Housing Need of 4,490 dpa using the latest standard method calculation assuming backlog demand
Experian population projections (March 2025) for Zones 3 and 7 outside Buckinghamshire

Table 2 - Leisure, entertainment and cultural expenditure per person per annum (£)

	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	484	497	514	532	551
2 - Buckinghamshire rural northeast	447	459	475	492	509
3 - Tring	429	440	455	472	488
4 - Aylesbury southeast/Wendover	535	549	568	588	609
5 - Aylesbury urban	332	341	353	366	379
6 - Buckingham rural northwest	473	486	503	521	539
7 - Thame/Chinnor	493	507	524	543	562
8 - Princes Risborough	583	599	620	642	664
9 - Marlow	678	696	720	746	772
10 - High Wycombe west	389	400	414	428	443
11 - High Wycombe east	466	478	495	513	531
12 - Chesham/Great Missenden	554	569	589	610	632
13 - Amersham/Chalfonts	701	720	745	771	799
14 - Beaconsfield/Gerrards Cross	697	716	740	767	794
15 - Denham/Iver	607	623	645	667	691

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Table 3 - Total Leisure, entertainment and cultural expenditure (£m)

	2024	2030	2035	2040	2045
1 - Buckingham/Winslow	16.67	18.21	19.71	21.39	23.28
2 - Buckinghamshire rural northeast	16.37	17.88	19.36	21.01	22.86
3 - Tring	7.27	7.58	7.91	8.25	8.62
4 - Aylesbury southeast/Wendover	21.48	23.47	25.40	27.57	30.00
5 - Aylesbury urban	20.45	22.34	24.18	26.25	28.56
6 - Buckingham rural northwest	19.41	21.20	22.95	24.90	27.10
7 - Thame/Chinnor	15.52	16.15	16.85	17.66	18.49
8 - Princes Risborough	18.60	20.32	22.00	23.88	25.98
9 - Marlow	35.55	38.83	42.03	45.62	49.64
10 - High Wycombe west	23.70	25.89	28.02	30.41	33.10
11 - High Wycombe east	20.47	22.36	24.20	26.27	28.58
12 - Chesham/Great Missenden	28.94	31.61	34.22	37.14	40.41
13 - Amersham/Chalfonts	44.21	48.30	52.28	56.74	61.74
14 - Beaconsfield/Gerrards Cross	28.61	31.26	33.83	36.72	39.96
15 - Denham/Iver	19.20	20.98	22.71	24.64	26.82
Total	**336.46**	**366.39**	**395.65**	**428.45**	**465.15**

Source: Tables 1 and 2

Table 4 - Base year Leisure, entertainment and cultural market shares (%)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1 - Buckingham	26%	1%	0%	0%	1%	3%	0%	0%	0%	0%	0%	0%	0%	0%	1%
1 - Winslow	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2 - Buckinghamshire rural northeast	2%	3%	2%	1%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
4 - Aylesbury southeast/Wendover	1%	0%	2%	16%	3%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%
5 - Aylesbury urban	9%	32%	17%	41%	65%	42%	12%	8%	2%	1%	1%	6%	1%	0%	1%
6 - Buckingham rural northwest	0%	2%	2%	0%	3%	3%	5%	0%	0%	0%	0%	0%	0%	0%	0%
8 - Princes Risborough	0%	3%	0%	3%	1%	0%	0%	19%	0%	1%	5%	2%	0%	0%	0%
9 - Marlow	0%	5%	0%	0%	0%	0%	0%	3%	30%	5%	13%	0%	6%	9%	2%
10/11 - High Wycombe	1%	1%	0%	1%	1%	2%	8%	33%	29%	67%	51%	18%	17%	16%	5%
12 - Chesham	0%	1%	0%	0%	0%	0%	0%	7%	1%	0%	0%	23%	8%	2%	0%
12 - Great Missenden	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%	1%	0%	0%
13 - Amersham/Chalfonts	0%	0%	0%	0%	1%	0%	0%	1%	1%	1%	2%	5%	20%	5%	4%
14 - Beaconsfield	0%	0%	0%	1%	0%	0%	0%	1%	1%	1%	2%	0%	2%	10%	1%
14 - Gerrards Cross	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	5%	6%	3%
15 - Denham/Iver	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	8%
Buckinghamshire total	**40%**	**48%**	**23%**	**63%**	**80%**	**51%**	**25%**	**72%**	**65%**	**76%**	**74%**	**58%**	**60%**	**48%**	**25%**
Outside Buckinghamshire															
Berkhamsted	0%	2%	8%	1%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%
Bicester	3%	1%	0%	1%	0%	9%	1%	0%	1%	0%	0%	0%	0%	0%	0%
Hemel Hempstead	0%	1%	5%	1%	0%	0%	0%	0%	0%	0%	0%	5%	1%	0%	1%
London	11%	6%	19%	14%	10%	10%	11%	19%	25%	19%	19%	19%	27%	25%	33%
Maidenhead	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%	7%	1%
Milton Keynes/Bletchley	27%	22%	2%	5%	5%	4%	1%	0%	0%	1%	1%	2%	1%	2%	3%
Oxford	4%	0%	0%	1%	2%	12%	24%	2%	1%	0%	2%	1%	0%	1%	1%
Slough	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	11%	23%
Watford	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%	1%	8%	4%	0%	2%
Elsewhere	15%	19%	42%	14%	3%	14%	38%	7%	5%	3%	3%	5%	6%	6%	11%
Outside sub-total	**60%**	**52%**	**77%**	**37%**	**20%**	**49%**	**75%**	**28%**	**35%**	**24%**	**26%**	**42%**	**40%**	**52%**	**75%**
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey February 2023 and Lichfields' analysis.

Table 5 - Base year 2024 leisure, entertainment and cultural expenditure patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2024	16.67	16.37	7.27	21.48	20.45	19.41	15.52	18.60	35.55	23.70	20.47	28.94	44.21	28.61	19.20	**336.46**
1 - Buckingham	4.33	0.16	0.00	0.00	0.20	0.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	5.48
1 - Winslow	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17
2 - Buckinghamshire rural northeast	0.33	0.49	0.15	0.21	0.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00
4 - Aylesbury southeast/Wendover	0.17	0.00	0.15	3.44	0.61	0.19	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	4.85
5 - Aylesbury urban	1.50	5.24	1.24	8.81	13.29	8.15	1.86	1.49	0.71	0.24	0.20	1.74	0.44	0.00	0.19	45.10
6 - Buckingham rural northwest	0.00	0.33	0.15	0.00	0.61	0.58	0.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.44
8 - Princes Risborough	0.00	0.49	0.00	0.64	0.20	0.00	0.00	3.53	0.00	0.24	1.02	0.58	0.00	0.00	0.00	6.71
9 - Marlow	0.00	0.82	0.00	0.00	0.00	0.00	0.00	0.56	10.66	1.18	2.66	0.00	2.65	2.58	0.38	21.50
10/11 - High Wycombe	0.17	0.16	0.00	0.21	0.20	0.39	1.24	6.14	10.31	15.88	10.44	5.21	7.52	4.58	0.96	63.41
12 - Chesham	0.00	0.16	0.00	0.00	0.00	0.00	0.00	1.30	0.36	0.00	0.00	6.66	3.54	0.57	0.00	12.59
12 - Great Missenden	0.00	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.44	0.00	0.00	1.23
13 - Amersham/Chalfonts	0.00	0.00	0.00	0.00	0.20	0.00	0.00	0.19	0.36	0.24	0.41	1.45	8.84	1.43	0.77	13.88
14 - Beaconsfield	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.19	0.36	0.24	0.41	0.00	0.88	2.86	0.19	5.34
14 - Gerrards Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.00	0.29	2.21	1.72	0.58	5.15
15 - Denham/Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.54	1.54
Buckinghamshire total	**6.67**	**7.86**	**1.67**	**13.54**	**16.36**	**9.90**	**3.88**	**13.39**	**23.11**	**18.01**	**15.15**	**16.78**	**26.53**	**13.73**	**4.80**	**191.37**
Outside Buckinghamshire																
Berkhamsted	0.00	0.33	0.58	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.00	0.00	0.00	1.70
Bicester	0.50	0.16	0.00	0.21	0.00	1.75	0.16	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00	3.14
Hemel Hempstead	0.00	0.16	0.36	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.45	0.44	0.00	0.19	2.82
London	1.83	0.98	1.38	3.01	2.05	1.94	1.71	3.53	8.89	4.50	3.89	5.50	11.94	7.15	6.34	64.64
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.07	0.00	0.00	0.00	0.00	2.00	0.19	3.26
Milton Keynes/Bletchley	4.50	3.60	0.15	1.07	1.02	0.78	0.16	0.00	0.00	0.24	0.20	0.58	0.44	0.57	0.58	13.89
Oxford	0.67	0.00	0.00	0.21	0.41	2.33	3.72	0.37	0.36	0.00	0.41	0.29	0.00	0.29	0.19	9.25
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.44	3.15	4.42	8.24
Watford	0.00	0.16	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	2.31	1.77	0.00	0.38	4.91
Elsewhere	2.50	3.11	3.05	3.01	0.61	2.72	5.90	1.30	1.78	0.71	0.61	1.45	2.65	1.72	2.11	33.23
Outside sub-total	**10.00**	**8.51**	**5.60**	**7.95**	**4.09**	**9.51**	**11.64**	**5.21**	**12.44**	**5.69**	**5.32**	**12.15**	**17.69**	**14.88**	**14.40**	**145.08**
TOTAL	**16.67**	**16.37**	**7.27**	**21.48**	**20.45**	**19.41**	**15.52**	**18.60**	**35.55**	**23.70**	**20.47**	**28.94**	**44.21**	**28.61**	**19.20**	**336.46**

Source: Table 3 and Table 4

Table 6 - Future 2030 leisure, entertainment and cultural expenditure patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2030	18.21	17.88	7.58	23.47	22.34	21.20	16.15	20.32	38.83	25.89	22.36	31.61	48.30	31.26	20.98	**366.39**
1 - Buckingham	4.73	0.18	0.00	0.00	0.22	0.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	5.98
1 - Winslow	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18
2 - Buckinghamshire rural northeast	0.36	0.54	0.15	0.23	0.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.18
4 - Aylesbury southeast/Wendover	0.18	0.00	0.15	3.76	0.67	0.21	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.00	5.29
5 - Aylesbury urban	1.64	5.72	1.29	9.62	14.52	8.90	1.94	1.63	0.78	0.26	0.22	1.90	0.48	0.00	0.21	49.11
6 - Buckingham rural northwest	0.00	0.36	0.15	0.00	0.67	0.64	0.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.62
8 - Princes Risborough	0.00	0.54	0.00	0.70	0.22	0.00	0.00	3.86	0.00	0.26	1.12	0.63	0.00	0.00	0.00	7.33
9 - Marlow	0.00	0.89	0.00	0.00	0.00	0.00	0.00	0.61	11.65	1.29	2.91	0.00	2.90	2.81	0.42	23.49
10/11 - High Wycombe	0.18	0.18	0.00	0.23	0.22	0.42	1.29	6.71	11.26	17.35	11.40	5.69	8.21	5.00	1.05	69.20
12 - Chesham	0.00	0.18	0.00	0.00	0.00	0.00	0.00	1.42	0.39	0.00	0.00	7.27	3.86	0.63	0.00	13.75
12 - Great Missenden	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.63	0.48	0.00	0.00	1.34
13 - Amersham/Chalfonts	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.20	0.39	0.26	0.45	1.58	9.66	1.56	0.84	15.16
14 - Beaconsfield	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.20	0.39	0.26	0.45	0.00	0.97	3.13	0.21	5.83
14 - Gerrards Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.00	0.00	0.32	2.42	1.88	0.63	5.62
15 - Denham/Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.68	1.68
Buckinghamshire total	**7.28**	**8.58**	**1.74**	**14.79**	**17.87**	**10.81**	**4.04**	**14.63**	**25.24**	**19.68**	**16.55**	**18.33**	**28.98**	**15.00**	**5.24**	**208.78**
Outside Buckinghamshire																
Berkhamsted	0.00	0.36	0.61	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.63	0.00	0.00	0.00	1.83
Bicester	0.55	0.18	0.00	0.23	0.00	1.91	0.16	0.00	0.39	0.00	0.00	0.00	0.00	0.00	0.00	3.42
Hemel Hempstead	0.00	0.18	0.38	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.58	0.48	0.00	0.21	3.07
London	2.00	1.07	1.44	3.29	2.23	2.12	1.78	3.86	9.71	4.92	4.25	6.01	13.04	7.81	6.92	70.45
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.16	0.00	0.00	0.00	0.00	2.19	0.21	3.56
Milton Keynes/Bletchley	4.92	3.93	0.15	1.17	1.12	0.85	0.16	0.00	0.00	0.26	0.22	0.63	0.48	0.63	0.63	15.15
Oxford	0.73	0.00	0.00	0.23	0.45	2.54	3.88	0.41	0.39	0.00	0.45	0.32	0.00	0.31	0.21	9.91
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.48	3.44	4.83	9.01
Watford	0.00	0.18	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.22	2.53	1.93	0.00	0.42	5.36
Elsewhere	2.73	3.40	3.18	3.29	0.67	2.97	6.14	1.42	1.94	0.78	0.67	1.58	2.90	1.88	2.31	35.85
Outside sub-total	**10.93**	**9.30**	**5.84**	**8.68**	**4.47**	**10.39**	**12.11**	**5.69**	**13.59**	**6.21**	**5.81**	**13.28**	**19.32**	**16.25**	**15.73**	**157.61**
TOTAL	**18.21**	**17.88**	**7.58**	**23.47**	**22.34**	**21.20**	**16.15**	**20.32**	**38.83**	**25.89**	**22.36**	**31.61**	**48.30**	**31.26**	**20.98**	**366.39**

Source: Table 3 and Table 4

Table 7 - Future 2035 leisure, entertainment and cultural expenditure patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2035	19.71	19.36	7.91	25.40	24.18	22.95	16.85	22.00	42.03	28.02	24.20	34.22	52.28	33.83	22.71	**395.65**
1 - Buckingham	5.12	0.19	0.00	0.00	0.24	0.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	6.48
1 - Winslow	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20
2 - Buckinghamshire rural northeast	0.39	0.58	0.16	0.25	0.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.35
4 - Aylesbury southeast/Wendover	0.20	0.00	0.16	4.06	0.73	0.23	0.00	0.00	0.00	0.00	0.00	0.34	0.00	0.00	0.00	5.72
5 - Aylesbury urban	1.77	6.19	1.34	10.42	15.72	9.64	2.02	1.76	0.84	0.28	0.24	2.05	0.52	0.00	0.23	53.03
6 - Buckingham rural northwest	0.00	0.39	0.16	0.00	0.73	0.69	0.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.80
8 - Princes Risborough	0.00	0.58	0.00	0.76	0.24	0.00	0.00	4.18	0.00	0.28	1.21	0.68	0.00	0.00	0.00	7.94
9 - Marlow	0.00	0.97	0.00	0.00	0.00	0.00	0.00	0.66	12.61	1.40	3.15	0.00	3.14	3.05	0.45	25.42
10/11 - High Wycombe	0.20	0.19	0.00	0.25	0.24	0.46	1.35	7.26	12.19	18.78	12.34	6.16	8.89	5.41	1.14	74.85
12 - Chesham	0.00	0.19	0.00	0.00	0.00	0.00	0.00	1.54	0.42	0.00	0.00	7.87	4.18	0.68	0.00	14.88
12 - Great Missenden	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.00	0.68	0.52	0.00	0.00	1.45
13 - Amersham/Chalfonts	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.22	0.42	0.28	0.48	1.71	10.46	1.69	0.91	16.41
14 - Beaconsfield	0.00	0.00	0.00	0.25	0.00	0.00	0.00	0.22	0.42	0.28	0.48	0.00	1.05	3.38	0.23	6.31
14 - Gerrards Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.34	2.61	2.03	0.68	6.09
15 - Denham/Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.82	1.82
Buckinghamshire total	**7.88**	**9.29**	**1.82**	**16.00**	**19.35**	**11.70**	**4.21**	**15.84**	**27.32**	**21.30**	**17.91**	**19.85**	**31.37**	**16.24**	**5.68**	**225.75**
Outside Buckinghamshire																
Berkhamsted	0.00	0.39	0.63	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	0.00	0.00	0.00	1.96
Bicester	0.59	0.19	0.00	0.25	0.00	2.07	0.17	0.00	0.42	0.00	0.00	0.00	0.00	0.00	0.00	3.69
Hemel Hempstead	0.00	0.19	0.40	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.71	0.52	0.00	0.23	3.30
London	2.17	1.16	1.50	3.56	2.42	2.29	1.85	4.18	10.51	5.32	4.60	6.50	14.12	8.46	7.49	76.13
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.26	0.00	0.00	0.00	0.00	2.37	0.23	3.86
Milton Keynes/Bletchley	5.32	4.26	0.16	1.27	1.21	0.92	0.17	0.00	0.00	0.28	0.24	0.68	0.52	0.68	0.68	16.39
Oxford	0.79	0.00	0.00	0.25	0.48	2.75	4.04	0.44	0.42	0.00	0.48	0.34	0.00	0.34	0.23	10.58
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.00	0.52	3.72	5.22	9.75
Watford	0.00	0.19	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	2.74	2.09	0.00	0.45	5.80
Elsewhere	2.96	3.68	3.32	3.56	0.73	3.21	6.40	1.54	2.10	0.84	0.73	1.71	3.14	2.03	2.50	38.44
Outside sub-total	**11.83**	**10.07**	**6.09**	**9.40**	**4.84**	**11.24**	**12.64**	**6.16**	**14.71**	**6.73**	**6.29**	**14.37**	**20.91**	**17.59**	**17.03**	**169.89**
TOTAL	**19.71**	**19.36**	**7.91**	**25.40**	**24.18**	**22.95**	**16.85**	**22.00**	**42.03**	**28.02**	**24.20**	**34.22**	**52.28**	**33.83**	**22.71**	**395.65**

Source: Table 3 and Table 4

Table 8 - Future 2040 leisure, entertainment and cultural expenditure patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2040	21.39	21.01	8.25	27.57	26.25	24.90	17.66	23.88	45.62	30.41	26.27	37.14	56.74	36.72	24.64	428.45
1 - Buckingham	5.56	0.21	0.00	0.00	0.26	0.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	7.03
1 - Winslow	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21
2 - Buckinghamshire rural northeast	0.43	0.63	0.17	0.28	1.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.55
4 - Aylesbury southeast/Wendover	0.21	0.00	0.17	4.41	0.79	0.25	0.00	0.00	0.00	0.00	0.00	0.37	0.00	0.00	0.00	6.20
5 - Aylesbury urban	1.93	6.72	1.40	11.30	17.06	10.46	2.12	1.91	0.91	0.30	0.26	2.23	0.57	0.00	0.25	57.43
6 - Buckingham rural northwest	0.00	0.42	0.17	0.00	0.79	0.75	0.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.00
8 - Princes Risborough	0.00	0.63	0.00	0.83	0.26	0.00	0.00	4.54	0.00	0.30	1.31	0.74	0.00	0.00	0.00	8.62
9 - Marlow	0.00	1.05	0.00	0.00	0.00	0.00	0.00	0.72	13.69	1.52	3.41	0.00	3.40	3.30	0.49	27.59
10/11 - High Wycombe	0.21	0.21	0.00	0.28	0.26	0.50	1.41	7.88	13.23	20.38	13.40	6.68	9.65	5.88	1.23	81.19
12 - Chesham	0.00	0.21	0.00	0.00	0.00	0.00	0.00	1.67	0.46	0.00	0.00	8.54	4.54	0.73	0.00	16.15
12 - Great Missenden	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.57	0.00	0.00	1.57
13 - Amersham/Chalfonts	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.24	0.46	0.30	0.53	1.86	11.35	1.84	0.99	17.81
14 - Beaconsfield	0.00	0.00	0.00	0.28	0.00	0.00	0.00	0.24	0.46	0.30	0.53	0.00	1.13	3.67	0.25	6.85
14 - Gerrards Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.37	2.84	2.20	0.74	6.61
15 - Denham/Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.97	1.97
Buckinghamshire total	**8.56**	**10.08**	**1.90**	**17.37**	**21.00**	**12.70**	**4.42**	**17.19**	**29.65**	**23.11**	**19.44**	**21.54**	**34.04**	**17.63**	**6.16**	**244.79**
Outside Buckinghamshire																
Berkhamsted	0.00	0.42	0.66	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.00	0.00	0.00	2.10
Bicester	0.64	0.21	0.00	0.28	0.00	2.24	0.18	0.00	0.46	0.00	0.00	0.00	0.00	0.00	0.00	4.00
Hemel Hempstead	0.00	0.21	0.41	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.86	0.57	0.00	0.25	3.57
London	2.35	1.26	1.57	3.86	2.62	2.49	1.94	4.54	11.40	5.78	4.99	7.06	15.32	9.18	8.13	82.50
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.37	0.00	0.00	0.00	0.00	2.57	0.25	4.19
Milton Keynes/Bletchley	5.78	4.62	0.17	1.38	1.31	1.00	0.18	0.00	0.00	0.30	0.26	0.74	0.57	0.73	0.74	17.78
Oxford	0.86	0.00	0.00	0.28	0.52	2.99	4.24	0.48	0.46	0.00	0.53	0.37	0.00	0.37	0.25	11.33
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.00	0.57	4.04	5.67	10.58
Watford	0.00	0.21	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	2.97	2.27	0.00	0.49	6.29
Elsewhere	3.21	3.99	3.47	3.86	0.79	3.49	6.71	1.67	2.28	0.91	0.79	1.86	3.40	2.20	2.71	41.34
Outside sub-total	**12.83**	**10.92**	**6.35**	**10.20**	**5.25**	**12.20**	**13.25**	**6.69**	**15.97**	**7.30**	**6.83**	**15.60**	**22.70**	**19.10**	**18.48**	**183.67**
TOTAL	**21.39**	**21.01**	**8.25**	**27.57**	**26.25**	**24.90**	**17.66**	**23.88**	**45.62**	**30.41**	**26.27**	**37.14**	**56.74**	**36.72**	**24.64**	**428.45**

Source: Table 3 and Table 4

Table 9 - Future 2045 leisure, entertainment and cultural expenditure patterns (£M)

Destination / Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Expenditure 2045	23.28	22.86	8.62	30.00	28.56	27.10	18.49	25.98	49.64	33.10	28.58	40.41	61.74	39.96	26.82	465.15
1 - Buckingham	6.05	0.23	0.00	0.00	0.29	0.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.27	7.65
1 - Winslow	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23
2 - Buckinghamshire rural northeast	0.47	0.69	0.17	0.30	1.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.77
4 - Aylesbury southeast/Wendover	0.23	0.00	0.17	4.80	0.86	0.27	0.00	0.00	0.00	0.00	0.00	0.40	0.00	0.00	0.00	6.74
5 - Aylesbury urban	2.09	7.32	1.47	12.30	18.56	11.38	2.22	2.08	0.99	0.33	0.29	2.42	0.62	0.00	0.27	62.34
6 - Buckingham rural northwest	0.00	0.46	0.17	0.00	0.86	0.81	0.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.22
8 - Princes Risborough	0.00	0.69	0.00	0.90	0.29	0.00	0.00	4.94	0.00	0.33	1.43	0.81	0.00	0.00	0.00	9.38
9 - Marlow	0.00	1.14	0.00	0.00	0.00	0.00	0.00	0.78	14.89	1.65	3.72	0.00	3.70	3.60	0.54	30.02
10/11 - High Wycombe	0.23	0.23	0.00	0.30	0.29	0.54	1.48	8.57	14.40	22.17	14.58	7.27	10.50	6.39	1.34	88.29
12 - Chesham	0.00	0.23	0.00	0.00	0.00	0.00	0.00	1.82	0.50	0.00	0.00	9.29	4.94	0.80	0.00	17.58
12 - Great Missenden	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.81	0.62	0.00	0.00	1.71
13 - Amersham/Chalfonts	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.26	0.50	0.33	0.57	2.02	12.35	2.00	1.07	19.38
14 - Beaconsfield	0.00	0.00	0.00	0.30	0.00	0.00	0.00	0.26	0.50	0.33	0.57	0.00	1.23	4.00	0.27	7.46
14 - Gerrards Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	0.40	3.09	2.40	0.80	7.19
15 - Denham/Iver	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.15	2.15
Buckinghamshire total	**9.31**	**10.97**	**1.98**	**18.90**	**22.85**	**13.82**	**4.62**	**18.71**	**32.27**	**25.15**	**21.15**	**23.44**	**37.05**	**19.18**	**6.70**	**266.11**
Outside Buckinghamshire																
Berkhamsted	0.00	0.46	0.69	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.81	0.00	0.00	0.00	2.26
Bicester	0.70	0.23	0.00	0.30	0.00	2.44	0.18	0.00	0.50	0.00	0.00	0.00	0.00	0.00	0.00	4.35
Hemel Hempstead	0.00	0.23	0.43	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.02	0.62	0.00	0.27	3.87
London	2.56	1.37	1.64	4.20	2.86	2.71	2.03	4.94	12.41	6.29	5.43	7.68	16.67	9.99	8.85	89.63
Maidenhead	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.49	0.00	0.00	0.00	0.00	2.80	0.27	4.55
Milton Keynes/Bletchley	6.28	5.03	0.17	1.50	1.43	1.08	0.18	0.00	0.00	0.33	0.29	0.81	0.62	0.80	0.80	19.33
Oxford	0.93	0.00	0.00	0.30	0.57	3.25	4.44	0.52	0.50	0.00	0.57	0.40	0.00	0.40	0.27	12.15
Slough	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.33	0.00	0.00	0.62	4.40	6.17	11.51
Watford	0.00	0.23	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.29	3.23	2.47	0.00	0.54	6.84
Elsewhere	3.49	4.34	3.62	4.20	0.86	3.79	7.03	1.82	2.48	0.99	0.86	2.02	3.70	2.40	2.95	44.56
Outside sub-total	**13.97**	**11.89**	**6.64**	**11.10**	**5.71**	**13.28**	**13.87**	**7.27**	**17.37**	**7.94**	**7.43**	**16.97**	**24.70**	**20.78**	**20.11**	**199.04**
TOTAL	**23.28**	**22.86**	**8.62**	**30.00**	**28.56**	**27.10**	**18.49**	**25.98**	**49.64**	**33.10**	**28.58**	**40.41**	**61.74**	**39.96**	**26.82**	**465.15**

Source: Table 3 and Table 4

Table 10 - Summary of leisure, entertainment and cultural expenditure expenditure 2024 to 2045 (£M)

Zone / Destination	2024	2030	2035	2040	2045
Available expenditure					
1 - Buckingham	5.48	5.98	6.48	7.03	7.65
1 - Winslow	0.17	0.18	0.20	0.21	0.23
2 - Buckinghamshire rural northeast	2.00	2.18	2.35	2.55	2.77
4 - Aylesbury southeast/Wendover	4.85	5.29	5.72	6.20	6.74
5 - Aylesbury urban	45.10	49.11	53.03	57.43	62.34
6 - Buckingham rural northwest	2.44	2.62	2.80	3.00	3.22
8 - Princes Risborough	6.71	7.33	7.94	8.62	9.38
9 - Marlow	21.50	23.49	25.42	27.59	30.02
10/11 - High Wycombe	63.41	69.20	74.85	81.19	88.29
12 - Chesham	12.59	13.75	14.88	16.15	17.58
12 - Great Missenden	1.23	1.34	1.45	1.57	1.71
13 - Amersham/Chalfonts	13.88	15.16	16.41	17.81	19.38
14 - Beaconsfield	5.34	5.83	6.31	6.85	7.46
14 - Gerrards Cross	5.15	5.62	6.09	6.61	7.19
15 - Denham/Iver	1.54	1.68	1.82	1.97	2.15
Total	**191.37**	**208.78**	**225.75**	**244.79**	**266.11**
Turnover of existing facilities					
1 - Buckingham	5.48	5.50	5.53	5.55	5.58
2 - Winslow	0.17	0.17	0.17	0.17	0.17
2 - Buckinghamshire rural northeast	2.00	2.01	2.02	2.03	2.04
4 - Aylesbury southeast/Wendover	4.85	4.87	4.89	4.91	4.94
5 - Aylesbury urban	45.10	45.28	45.51	45.74	45.97
6 - Buckingham rural northwest	2.44	2.45	2.47	2.48	2.49
8 - Princes Risborough	6.71	6.74	6.77	6.81	6.84
9 - Marlow	21.50	21.58	21.69	21.80	21.91
10/11 - High Wycombe	63.41	63.66	63.98	64.30	64.62
12 - Chesham	12.59	12.64	12.70	12.76	12.83
12 - Great Missenden	1.23	1.23	1.24	1.24	1.25
13 - Amersham/Chalfonts	13.88	13.94	14.01	14.08	14.15
14 - Beaconsfield	5.34	5.36	5.39	5.42	5.44
14 - Gerrards Cross	5.15	5.17	5.19	5.22	5.25
15 - Denham/Iver	1.54	1.54	1.55	1.56	1.57
Total	**191.37**	**192.14**	**193.10**	**194.07**	**195.04**
Surplus/deficit expenditure £M					
1 - Buckingham	0.00	0.48	0.95	1.47	2.07
2 - Winslow	0.00	0.01	0.03	0.04	0.06
2 - Buckinghamshire rural northeast	0.00	0.17	0.33	0.52	0.73
4 - Aylesbury southeast/Wendover	0.00	0.42	0.83	1.28	1.80
5 - Aylesbury urban	0.00	3.83	7.52	11.69	16.38
6 - Buckingham rural northwest	0.00	0.17	0.33	0.52	0.73
8 - Princes Risborough	0.00	0.59	1.16	1.81	2.53
9 - Marlow	0.00	1.90	3.73	5.79	8.11
10/11 - High Wycombe	0.00	5.54	10.88	16.89	23.67
12 - Chesham	0.00	1.11	2.18	3.39	4.75
12 - Great Missenden	0.00	0.11	0.21	0.33	0.46
13 - Amersham/Chalfonts	0.00	1.23	2.41	3.74	5.24
14 - Beaconsfield	0.00	0.47	0.93	1.44	2.02
14 - Gerrards Cross	0.00	0.46	0.89	1.39	1.94
15 - Denham/Iver	0.00	0.14	0.27	0.41	0.58
Total	**0.00**	**16.64**	**32.65**	**50.72**	**71.07**

Source: Tables 5 to 9

Table 11 - Leisure, entertainment and cultural floorspace capacity up to 2045

Zone / Destination	2024	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£2,750	£2,761	£2,775	£2,789	£2,803
Floorspace projection (sq.m gross)					
1 - Buckingham	0	175	342	529	737
1 - Winslow	0	5	10	16	22
2 - Buckinghamshire rural northeast	0	62	120	186	259
4 - Aylesbury southeast/Wendover	0	153	298	460	642
5 - Aylesbury urban	0	1,387	2,711	4,192	5,843
6 - Buckingham rural northwest	0	61	121	188	261
8 - Princes Risborough	0	215	420	648	904
9 - Marlow	0	689	1,344	2,076	2,894
10/11 - High Wycombe	0	2,008	3,919	6,057	8,446
12 - Chesham	0	403	787	1,215	1,695
12 - Great Missenden	0	39	77	118	165
13 - Amersham/Chalfonts	0	445	867	1,340	1,869
14 - Beaconsfield	0	171	334	516	719
14 - Gerrards Cross	0	165	322	497	693
15 - Denham/Iver	0	49	96	148	207
Total	**0**	**6,026**	**11,767**	**18,186**	**25,356**

Source: Table 10

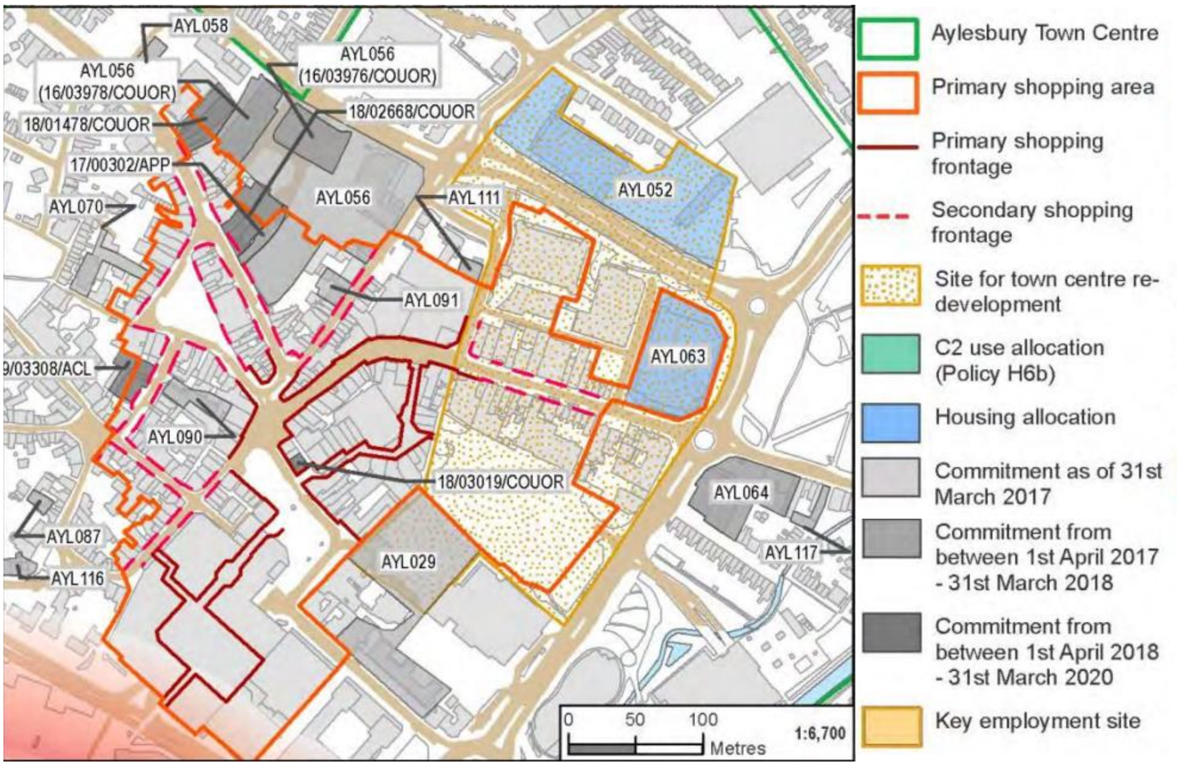
Appendix 6 Aylesbury health check

Aylesbury

Introduction

6.1 Aylesbury Town Centre is designated as a *'Town Centre'* within the Vale of Aylesbury Adopted Local Plan (September 2021), which places it at the top of the retail hierarchy of centres for the Aylesbury Vale area. Aylesbury is expected to be the main location for growth in its role as a Garden Town. The Adopted Local Plan identifies a Primary Shopping Area (PSA) and a wider town centre boundary. The PSA comprised primary and secondary shopping frontages. The primary shopping frontage are focused on the pedestrianised Market Square and High Street, including the Friars Square and Hale Leys Shopping Centres, as shown in Figure A below.

Figure A - Aylesbury Town Centre Primary Shopping Area



Source: Vale of Aylesbury Adopted Local Plan (September 2021) Proposals Map.

6.2 The secondary frontages include peripheral shopping streets including Buckingham Street, Cambridge Street, Temple Street and the unpedestrianised section of the High Street. The wider town centre boundary includes the railway station, Morrisons and Waitrose stores, Aylesbury Shopping Park, Vale Retail Park and employment use to the west of the railway line. The PSA is a relatively compact area providing natural circuits for pedestrians.

Mix of uses

6.3 Aylesbury has 333 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundary. The total ground floor area of these units totals 77,700 sq.m gross, and an average of 233 sq.m gross per unit. Aylesbury is the second largest centre in Buckinghamshire, behind High Wycombe. There is a general street market on Wednesdays, Fridays and Saturdays and occasional specialist markets with up to 40 stalls. The diversity of uses within the centre is set out in Tables A1 and A2, compared with the average across Buckinghamshire and the Goad Plan national average.

Table A1 - Mix of shops/service units in Aylesbury Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	30	9.0	7.4	9.8
Comparison goods retail	81	24.3	31.2	28.8
Financial/professional services	40	12.0	9.4	8.9
Restaurants/Cafés	34	10.2	10.6	10.2
Pubs/Bars	14	4.2	4.4	5.0
Hot food takeaways	16	4.8	5.0	6.3
Other non-retail services	63	18.9	19.5	16.6
Vacant	55	16.5	12.6	14.4
Total	**333**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Aylesbury (January 2022).

6.4 The centre's mix of units is very similar to the national average, both in terms of units and floorspace. The centre has a slightly lower proportion of comparison goods units than the Buckinghamshire and UK averages, but a higher proportion of comparison goods floorspace, due to the presence of large comparison stores e.g. Marks & Spencer, House of Fraser and QD Stores. The proportion of comparison goods retailers (31.2%) has fallen when compared with the health check undertaken for the Aylesbury Vale Retail Study 2014 (34.9%), but this is a general trend seen across most centres in the UK. Aylesbury remains above the national average in terms of comparison goods floorspace.

6.5 Vacancies (55 units, equating to 16.5%) is above the Buckinghamshire and UK averages, although the floorspace vacancy rate (11.9%) is lower than the UK average (15.4%), which suggests many of the vacant shop units in Aylesbury are smaller than average. The average size of vacant shop units is 168 sq.m. The vacancy rate increased significantly from 4.8% in 2014 to 16.5% in 2022. The amount of vacant floorspace increased from 4,961 sq.m to 9,250 sq.m. However, a large number (23 units) of the vacant units recorded by Goad in January 2022 were under alteration, which suggests the vacancy rate will have fallen since this survey. There were 14 units recorded as under alteration on the lower ground floor Cloisters area of Friars Square. This area is now occupied by a gym and estate agents.

6.6 More recent (quarter 1 – 2023) information collected by the Council's Economic Growth and Regeneration department suggests the number of vacant units had fallen to 38 units.

6.7 Convenience units take up a slightly higher proportion of floorspace than the UK average, due to the presence of three large food stores i.e. Morrisons, Sainsbury's and Waitrose and a good variety and choice of small specialist independent shops.

Table A2 - Mix of shops/service floorspace in Aylesbury Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	14,750	19.0	17.7
Comparison goods retail	32,380	41.7	33.9
Financial/professional services	6,000	7.7	7.3
Restaurants/Cafés	5,160	6.6	7.2
Pubs/Bars	3,500	4.5	6.5
Hot food takeaways	1,610	2.1	3.4
Other non-retail services	5,050	6.5	8.6
Vacant	9,250	11.9	15.4
Total	**77,700**	**100.0**	**100.0**

Source: Experian Goad for Aylesbury (January 2022).

Retailer representation

6.8 Aylesbury has a good selection of comparison shops (81), the third highest in Buckinghamshire behind High Wycombe and Marlow. Only one category is not represented in the centre (cars, motorcycles and accessories) and the choice of outlets is reasonable in most categories. Aylesbury has a particularly good provision of electrical shops, jewellery shops and chemists/opticians. The provision of furniture/carpet shops is under-represented for a centre of is size. Overall, Aylesbury has a good mix and choice of comparison goods shops.

Table A3 - Mix of comparison goods stores in Aylesbury Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	14	17.3	13.6	21.1	24.2
Furniture, carpets and textiles	4	4.9	1.5	7.6	7.9
Books, arts, cards and stationers	7	8.6	6.1	6.2	4.1
Electrical, music and photography	13	16.0	3.2	9.4	5.0
DIY, hardware and homeware	4	4.9	13.0	7.0	13.0
China, glass and gifts	1	1.2	0.1	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	11	13.6	10.8	12.0	10.4
Variety, department and catalogue	3	3.7	42.1	1.6	12.2
Florists, nurserymen and seedsmen	2	2.5	0.2	2.3	0.9
Toys, hobby, cycle and sports	4	4.9	2.8	5.4	5.8
Jewellers	6	7.4	1.7	5.1	2.2
Charity and second-hand shops	8	9.9	3.8	9.8	6.6
Other comparison goods retailers	4	4.9	1.1	5.5	3.2
Total	**81**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Aylesbury (January 2022).

6.9 Aylesbury has a strong provision of national multiple comparison retailers (excluding charity shops), when compared with most other centres in Buckinghamshire. The multiple comparison retailers include:

Table A4 - Aylesbury's comparison multiples

Accessorize	H&M	QD Stores	The Entertainer
Bargain Buys	JD Sports	River Island	The Works
Boots	Marks & Spencer	Savers	Three
CeX Entertainment	New Look	Scope	Trespass
Card Factory	Next	Shoe Zone	Vision Express
Claire's	O2	Smiggle	Vodafone
Clarks	Office	Specsavers	Warren James
EE	Pandora	Superdrug	Waterstones
H Samuel	Poundland	The Body Shop	WHSmith

6.10 The household survey respondents were asked what they like about Aylesbury town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table A5.

Table A5 - Shopping provision - satisfaction v dissatisfaction in Aylesbury (% of respondents visiting centre

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Non-food shops	4.6	-7.6	-3.0	1.1
Food shops (bakers/butchers/grocers)	0.0	-3.9	-3.9	-2.4
Clothing shops	1.8	-15.7	-13.9	-5.1
Quality of shops	1.8	-3.7	-1.9	0.2
High street multiples	4.2	-12.2	-8.0	-2.2
Independent/specialist shops	1.0	-10.5	-9.5	3.7
Affordability of shops	3.3	-8.1	-4.8	-3.3
Street market	3.2	-2.4	0.8	1.3
Supermarkets	2.9	-2.5	0.4	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

6.11 When compared with the Buckinghamshire average, Aylesbury has higher levels of net dissatisfaction with seven of the nine shopping provision factors, which suggests customers' aspirations are not being met fully.

Non-retail services

6.12 Aylesbury also has a strong service sector (comprising 167 units in total) with all the main categories represented in the centre. There is a high proportion of banks/other financial services and estate agents. Food and beverage uses are comparable with the national average. There is a reasonable mix of independent and multiple food/beverage outlets. Multiples include Caffe Nero, Nando's, Wagamama and Zizzi. Other non-retail and community facilities include a cinema, social clubs, council offices, library, health centre, vet and health/fitness clubs.

Table A6 - Mix of service uses in Aylesbury Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	34	24.3	28.1	24.3	24.6
Hot food/takeaways	16	11.4	8.8	15.0	11.4
Pubs/bars	14	10.0	19.1	11.9	22.0
Banks/other financial services	16	11.4	16.6	7.9	11.3
Betting shops/casinos/amusement	7	5.0	4.7	3.7	6.7
Estate agents/valuers	15	10.7	7.6	7.7	6.2
Travel agents	4	2.9	1.9	1.4	1.1
Hairdressers/beauty parlours	33	23.6	12.8	26.5	15.5
Launderettes/dry cleaners	1	0.7	0.4	1.6	1.1
Sub-total	**140**	**100.0**	**100.0**	**100.0**	**100.0**
Other	27				
Total	**167**				

Source: Experian Goad for Aylesbury (January 2022).

6.13 The household survey results also show conflicting views in relation to non-retail, as shown in Table A7.

Table A7 - Non-retail services - satisfaction v dissatisfaction in Aylesbury (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	8.7	-4.6	4.1	11.0
Pubs / bars	2.7	-2.0	0.7	0.1
Financial services	1.0	-1.1	-0.1	-1.4
Other services	1.5	0.0	1.5	1.0
Leisure facilities	7.3	-3.7	3.6	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

6.14 When compared with the Buckinghamshire average, Aylesbury has lower levels of net satisfaction with cafés/restaurants, but higher levels of satisfaction with pubs/bars, other services and leisure facilities.

Catchment area

6.15 The household survey results indicate 39% of respondents (705 households out of 1,803 surveyed) across the study area had visited shops, services or leisure facilities at Aylesbury town centre in the last six months, the second highest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was 4.9%, also second behind High Wycombe. The retail capacity analysis suggests Aylesbury attracts 18.3% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from nine zones in the northern half of the study area.

6.16 The combined base year turnover of Aylesbury is estimated to be £799 million (from the capacity analysis in Appendix 2 to 4), the second highest turnover in Buckinghamshire behind High Wycombe. Aylesbury's turnover is split £289 million for convenience retail goods, £381 million for comparison retail goods and £129 million for food/beverage. Aylesbury has an extensive sub-regional catchment area.

Rental levels

6.17 According to the VOA (April 2023), Aylesbury only has the =7th highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £420 per sq.m, below the average of £511 per sq.m for the Buckinghamshire town centres assessed. These figures suggest rental levels are relatively weak for a centre of its size and may indicate occupier demand is low compared with the supply of available premises. Zone A rents range from £390 to £420 per sq.m in the prime pitch in Friars Square. In the Market Square, Buckingham Street and Cambridge Street area Zone A rents range from £295 to £360 per sq.m.

Accessibility

6.18 Aylesbury Railway Station is located 150-metres to the southwest of the Friars Square Shopping Centre linked by a footbridge. The bus station is located under the shopping centre. Within the main shopping areas, bus stops are located on Buckingham Street, Exchange Street, High Street, New Street and Kingsbury Square.

6.19 Aylesbury town centre is served by 11 public car parks with 1,378 short stay spaces (64 disabled) and 561 long stay spaces (22 disabled). Short stay charges (in April 2023) were generally £1.10/£1.60 up to one hour or £2.10/£2.60 for up to three hours. Long stay car parking is £8.10 all day. Car parks are located within or around the periphery of the centre and most are accessible and close to the main shopping area. Friars Square Shopping Centre has 360 parking spaces (£1.60 for one hour or £2.60 for up to three hours).

6.20 Of the household survey respondents who had visited Aylesbury in the last six months, the proximity of the centre to home, work or friends/relatives were key attributes visitors mentioned they like about the centre. For Aylesbury, higher proportions of visitors mentioned proximity to home (29.2% compared with the Buckinghamshire average of 20.7%), work (4.7% compared with 4.1%) and friends/relations (7.4% compared with 5.7%).

6.21 These survey respondents were asked what they like about Aylesbury town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table A8.

6.22 When compared with the Buckinghamshire average, Aylesbury has higher levels of net dissatisfaction with car accessibility/traffic congestion, disabled access, bus/train services, cost of car parking and pedestrianised/traffic free areas. However, there is higher levels of net satisfaction with the availability of car parking and the layout of the centre.

Table A8 - Levels of accessibility - satisfaction v dissatisfaction in Aylesbury (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0.2	-4.6	-4.4	-2.9
Disabled access	0.4	-1.7	-1.3	-0.1
Bus services	3.6	-4.8	-1.2	-0.8
Train services	0.9	-2.4	-1.5	0.5
Car parking - amount	6.0	-4.7	1.3	-5.8
Car parking - cost	2.2	-12.2	-10.0	-7.6
Pedestrianised/traffic free areas	1.0	-2.3	-1.3	1.2
Centre layout	3.9	-0.7	3.2	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Environment and ambience

6.23 Aylesbury benefits from clear sign posting between the town squares and the secondary, lower order streets to the north of the centre with fewer retail anchors. The centre features public art, statues and a clock tower that break up Market Square in particular, demarcating it as the core of the centre. To the south of the centre, the Aylesbury Waterside development is well-linked to The Exchange providing high quality public realm and accessible outdoor space.

6.24 Of the household survey respondents who had visited Aylesbury in the last six months, lower proportions of visitors indicated they like the centre's historic character/heritage (1.9% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (0.9% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table A9.

Table A9 - Environment and ambience - satisfaction v dissatisfaction in Aylesbury (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	8.1	-6.7	1.4	16.7
Street cleanliness/maintenance	3.4	-6.1	-2.7	3.2
Atmosphere/friendliness	1.2	-0.1	1.1	6.0
Undercover shopping	1.7	-0.6	1.1	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

6.25 When compared with the Buckinghamshire average, Aylesbury has higher levels of net dissatisfaction with street cleanliness/maintenance. Overall in relation to all four factors, Aylesbury is rated poorly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Occurrence of crime and perception of safety

6.26 UK Crime Stats indicate there were 7,199 crimes reported in Aylesbury in the year to November 2022, indicating a crime rate of 122.8 crimes per 1,000 people. This is much higher than the Buckinghamshire crime rate average of 98.2 crimes per 1,000 people over the same period and is the 2nd highest rate of crime of the 12 towns assessed in this study, behind only High Wycombe.

6.27 Of the household survey respondents who had visited Aylesbury in the last six months, 2.3% mentioned more security or better personal safety as a required improvement that would make them visit more often. Although this percentage figure is relatively small it was the 2nd highest recorded for the 14 centres in Buckinghamshire.

SWOT analysis

Strengths

- The second largest centre in Buckinghamshire at the top of the hierarchy. The centre has a relatively extensive sub-regional catchment area.
- A good range and choice of comparison goods shops with a strong provision of national multiples, including large anchor stores e.g. Marks & Spencer and House of Fraser.
- There are three large food stores suitable for bulk and top-up shopping, supported by a good choice of small specialist convenience shops.
- There is a street market three days a week.
- There is a strong provision of non-retail services, particularly banks/financial services, estate agents and entertainment facilities including the theatre.
- The Buckinghamshire New University attracts additional students and visitors to the centre.
- The primary shopping areas is relatively compact with traffic free areas and covered shopping areas, providing natural circuits for pedestrians.
- Aylesbury has higher levels of visitor satisfaction with pubs/bars, other services and leisure facilities than the Buckinghamshire average.
- Aylesbury has higher levels of visitor satisfaction with the availability of car parking and the layout of the centre than other centres in Buckinghamshire.

Weaknesses

- The shop vacancy rate increased significantly in recent years and was higher than the Buckinghamshire and UK averages in 2022, which suggests operator demand for premises is weaker. However, more recent data suggests the vacancy rate has improved in 2023.
- There are higher levels of visitor dissatisfaction in terms of shopping provision when compared with the Buckinghamshire average, which suggests customers' aspirations are not being met fully.
- The town has the 2nd highest crime rate and the 2nd worst perception of security and safety in Buckinghamshire.

- Aylesbury has lower levels of satisfaction with cafés/restaurants than the Buckinghamshire average.
- Retail rental levels are relatively weak for a centre of its size, which with the high vacancy rate, suggests operator demand is lower than the supply of premises.
- The sense of arrival at the railway and bus stations is relatively poor and could be better connected to the town centre.
- In terms of accessibility, Aylesbury has higher levels of visitor dissatisfaction with car accessibility/traffic congestion, disabled access, bus/train services, cost of car parking and pedestrianised/traffic free areas than other centres in Buckinghamshire.
- Aylesbury is rated poorly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Opportunities

- As a focus for growth and as a Garden Town, future population and employment should strengthen trade for the town centre with the potential to improve shops, services and leisure facilities. The Regeneration Bucks – Transforming for the Future (October 2023) and the Aylesbury Regeneration Strategy recognise Aylesbury has significant opportunities for growth, regeneration and redevelopment.
- Many of the vacant units recorded in 2022 were under-alteration, which indicates the centre is attracting new investment. The relatively large number of vacant premises provide opportunities for further investment, including non-retail services and leisure uses.
- The lower levels of visitor satisfaction with shopping provision in general and cafés/ restaurants suggest there is latent demand for these types of facilities, which could build on the existing leisure and entertainment offer.

Threats

- The catchment areas of Aylesbury, Oxford and Milton Keynes overlap. Expenditure leakage from Aylesbury's catchment area may increase in the future if improvements to the town centre are not secured.
- The number of comparison shops has fallen in recent years. The continuation of this trend could lead to a higher vacancy rate and undermine the vitality and viability of the centre.
- Continuing national market difficulties and increasing on-line shopping could continue to reduce retail operator demand for space in the centre.
- National trends have led to multiple chain stores restructuring their portfolios, which may increase vacancy levels and reduce footfall. The polarisation of national multiple in larger centres such as Milton Keynes may exacerbate this trend.
- The longer-term impact of the cost of living crisis and Brexit may change customers' shopping habits, which could reduce footfall in the town centre and could lead to an increase in shop vacancies.

Future priorities

Table A10 Aylesbury Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Low
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Low
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Low
Merchandise Range/quality of goods; assortments; merchandising	Low
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Low
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Low
Accessibility Accessibility; convenience; public transport	Low
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Low
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Low
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	High
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	Medium
Liveable Multi/mono-functional; liveability; personal services; mixed use	Low
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Low
Innovation Opportunities to experiment; retail innovation	High

Appendix 7 Chesham health check

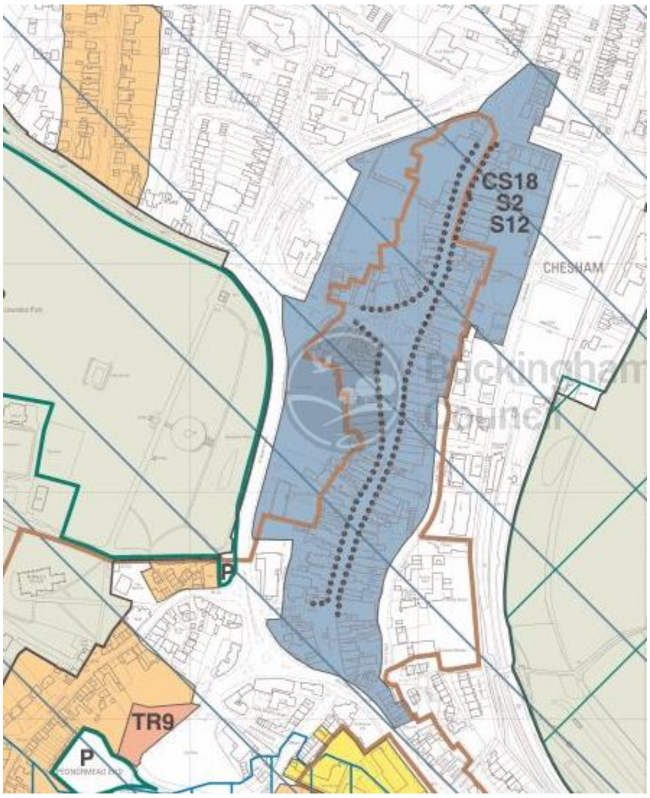
Chesham

Introduction

7.1 Chesham Town Centre is designated as a *'District Centre'* in the Chiltern District Local Plan (adopted 1997 and Consolidated September 2007 and November 2011), which placed it top of the retail hierarchy of centres for the Chiltern plan area. The designated Shopping boundary and Principal Shopping Frontages are shown in Figure C. Most of the designated Shopping area is within a Conservation Area.

7.2 Principal Shopping Frontages include most of the Shopping Area, with only Broad Street, Market Square, Red Lion Street and White Hill excluded. The centre is linear stretching approximately 600 metres north to south.

Figure C - Chesham Town Centre Boundary



Source: Chiltern District Local Plan Proposals Map.

Mix of uses

7.3 Chesham has 168 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 27,500 sq.m gross, an average of 164 sq.m gross per unit. Chesham is the fifth largest centre after High Wycombe, Aylesbury, Marlow and Beaconsfield New Town. There is a street market on Wednesdays and Saturdays with 20 to 30 stalls. There is also a monthly local produce market. The diversity of uses within the centre is set out in Table C1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table C1 - Mix of shops/service units in Chesham Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	13	7.7	7.4	9.8
Comparison goods retail	61	36.3	31.2	28.8
Financial/professional services	15	8.9	9.4	8.9
Restaurants/Cafés	18	10.7	10.6	10.2
Pubs/Bars	7	4.2	4.4	5.0
Hot food takeaways	6	3.6	5.0	6.3
Other non-retail services	30	17.9	19.5	16.6
Vacant	18	10.7	12.6	14.4
Total	**168**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Chesham (April 2022).

7.4 The centre's mix of units is similar when compared with the national average, although there is a relatively high proportion of comparison goods shops and a low proportion of hot food takeaways. The proportion of convenience goods outlets is slightly below the UK average, but there is a higher than average amount of floorspace due to the large Sainsbury's and Waitrose stores. Consistent with the national trend, the proportion of comparison goods shops has decreased from 43.5% in 2016 to 36.3%, based on information within the 2017 Chiltern and South Bucks Retail Study.

7.5 Shop vacancies (18 units, equating to 10.7%) are lower than the Buckinghamshire and UK averages, although the vacancy rate increased from 7.8% in 2016. More recent (quarter 1-2023) information collected by the Council's Economic Growth and Regeneration department also suggests 18 vacant units.

Table C2 - Mix of shops/service floorspace in Chesham Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	6,610	24.0	17.7
Comparison goods retail	9,790	35.6	33.9
Financial/professional services	2,320	8.4	7.3
Restaurants/Cafés	2,560	9.3	7.2
Pubs/Bars	1,190	4.3	6.5
Hot food takeaways	390	1.4	3.4
Other non-retail services	2,570	9.3	8.6
Vacant	2,070	7.5	15.4
Total	**27,500**	**100.0**	**100.0**

Source: Experian Goad for Chesham (April 2022).

Retailer representation

7.6 Chesham has a reasonable selection of comparison shops (61), which is the fourth highest in Buckinghamshire behind High Wycombe, Aylesbury and Marlow. All the Goad categories are represented except for cars, motorcycles and accessories but the choice of outlets in some categories is limited. There is a significant under-representation of clothing and footwear shops, but Chesham has a good provision of furniture/carpet shops, Books/arts/cards/stationers, chemist/opticians and charity/second-hand shops.

Table C3 - Mix of comparison goods stores in Chesham Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	3	4.9	22.3	21.1	24.2
Furniture, carpets and textiles	7	11.5	8.5	7.6	7.9
Books, arts, cards and stationers	5	8.2	9.9	6.2	4.1
Electrical, music and photography	7	11.5	7.7	9.4	5.0
DIY, hardware and homeware	4	6.6	9.3	7.0	13.0
China, glass and gifts	2	3.3	1.4	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	11	18.0	17.4	12.0	10.4
Variety, department and catalogue	1	1.6	0.9	1.6	12.2
Florists, nurserymen and seedsmen	1	1.6	0.4	2.3	0.9
Toys, hobby, cycle and sports	3	4.9	4.1	5.4	5.8
Jewellers	3	4.9	1.4	5.1	2.2
Charity and second-hand shops	9	14.8	14.1	9.8	6.6
Other comparison goods retailers	5	8.2	2.7	5.5	3.2
Total	**61**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Chesham (April 2022).

7.7 Chesham has a small provision of national multiple comparison retailers (excluding charity shops). Most comparison shops are independent traders. The multiple comparison retailers include:

Table C4 - Chesham's comparison multiples

Argos (in Sainsbury's)	Card Factory	Savers	Waterstones
Boots Chemist	Millets	Specsavers	WH Smiths
Boots Opticians			

Source: Experian Goad for Chesham (April 2022).

7.8 The household survey respondents were asked what they like about Chesham town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table C5.

7.9 When compared with the Buckinghamshire average, Chesham has higher levels of net dissatisfaction with non-food shops, clothing shops, quality of shops and high street multiples. There is a high level of satisfaction with the street market.

Table C5 - Shopping provision - satisfaction v dissatisfaction in Chesham (% of respondents visiting centre).

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	5.1	-6.7	-1.6	1.1
Food shops (bakers/butchers/grocers)	1.9	-4.0	-2.1	-2.4
Clothing shops	0.8	-16.7	-15.9	-5.1
Quality of shops	3.2	-8.2	-5.0	0.2
High street multiples	1.1	-8.8	-7.7	-2.2
Independent/specialist shops	3.9	-7.1	-3.2	3.7
Affordability of shops	2.2	-3.4	-1.2	-3.3
Street market	6.0	-0.8	5.2	1.3
Supermarkets	3.3	-4.0	-0.7	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

Non-retail services

7.10 Chesham has a relatively strong service sector (comprising 76 units in total) with only travel agents not represented in the centre. There is a high proportion of banks/other financial services, estate agents and hairdressers/beauty parlours. There is a low proportion of hot food takeaways, but the provision of restaurant/cafés and pubs/bars is broadly in line with the UK average. Costa Coffee and Caffe Nero are the only café/restaurant multiples. Other non-retail and community facilities include a library, theatre, churches, job centre, nursery and a health/fitness club.

Table C6 - Mix of service uses in Chesham Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	18	26.9	33.0	24.3	24.6
Hot food/takeaways	6	9.0	5.0	15.0	11.4
Pubs/bars	7	10.4	15.3	11.9	22.0
Banks/other financial services	6	9.0	16.6	7.9	11.3
Betting shops/casinos/amusement	1	1.5	1.7	3.7	6.7
Estate agents/valuers	6	9.0	7.5	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	21	31.3	17.7	26.5	15.5
Launderettes/dry cleaners	2	3.0	3.2	1.6	1.1
Sub-total	**67**	**100.0**	**100.0**	**100.0**	**100.0**
Other	9				
Total	**76**				

Source: Experian Goad for Chesham (April 2022).

7.11 The household survey results also show conflicting views in relation to non-retail, as shown in Table C7.

7.12 When compared with the Buckinghamshire average, Chesham has higher levels of net dissatisfaction with pubs/bars, financial services and leisure facilities, but higher levels of satisfaction with other services.

Table C7 - Non-retail services - satisfaction v dissatisfaction in Chesham (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	9.0	-4.4	4.6	11.0
Pubs / bars	2.1	-3.3	-1.2	0.1
Financial services	0.6	-2.2	-1.6	-1.4
Other services	4.6	-1.6	3.0	1.0
Leisure facilities	3.9	-4.6	-0.7	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

Catchment area

7.13 The household survey results indicate 14.4% of respondents across the study area had visited shops, services or leisure facilities at Chesham town centre in the last six months, the fifth lowest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was 1.6%, which was the fourth highest figure. The retail capacity analysis suggests Chesham attracts 2.2% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from two zones in the southeast of the study area.

7.14 The combined base year turnover of Chesham is estimated to be £98 million, the 7th highest turnover in Buckinghamshire. Chesham's turnover is split £29 million for convenience retail goods, £46 million for comparison retail goods and £23 million for food/beverage.

7.15 Chesham has a relatively small, localised catchment area, but has a good mixed retail and food/beverage trading base.

Rental levels

7.16 According to the VOA, Chesham has the =3rd lowest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £330 per sq.m, much lower than the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are relatively weak for a centre of its size and may indicate occupier demand is low compared with the supply of available premises. Zone A rents range from £200 to £330 per sq.m in the prime pitch in the Broadway.

Accessibility

7.17 The St Mary's Way ring road separates the town centre from Lowndes Park, The Elgiva Theatre and residential areas to the west. Subways and crossing points could be improved.

7.18 Chesham Railway Station is just to the east of the main shopping area. Bus stops are distributed around the centre on Broad Street, Blucher Street, The Broadway, Red Lion Street and Park Road. Chesham town centre has five public car parks with 467 spaces (29 disabled). There is further parking at the Waitrose and Sainsbury's stores. Short stay charges are generally £0.80 up to one hour or £2.10 up to three hours. Car parks are located within or close to the centre and are accessible to the main shopping area.

7.19 Of the household survey respondents who had visited Chesham in the last six months, the proximity of the centre to home, work or friends/relatives were key attributes visitors mentioned they like about the centre. For Chesham, higher proportions of visitors mentioned proximity to home (29.1% compared with the Buckinghamshire average of 20.7%), work (8.1% compared with 4.1%) and friends/relations (6.6% compared with 5.7%).

7.20 These survey respondents were asked what they like about Chesham town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table C8.

Table C8 - Levels of accessibility - satisfaction v dissatisfaction in Chesham (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	1.0	-2.2	-1.2	-2.9
Disabled access	0.7	0.0	0.7	-0.1
Bus services	1.3	-5.0	-3.7	-0.8
Train services	1.3	-0.2	1.2	0.5
Car parking - amount	10.1	-2.9	7.2	-5.8
Car parking - cost	3.0	-10.3	-7.3	-7.6
Pedestrianised/traffic free areas	6.2	-0.2	6.0	1.2
Centre layout	3.6	-0.2	3.4	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

7.21 When compared with the Buckinghamshire average, Chesham has higher levels of net dissatisfaction only with bus services. There are higher levels of net satisfaction with disabled access, train services, amount of car parking and pedestrianised/traffic free areas.

Environment and ambience

7.22 Chesham has pedestrian friendly traffic free areas that provide an attractive environment for visitors. The centre could benefit from more signage and town maps. The quality of paving and street furniture is good. The market square area is particularly attractive. Signage and linkages between the station area and the town centre could be improved.

7.23 Of the household survey respondents who had visited Chesham in the last six months, a higher proportion of visitors indicated they like the centre's historic character/heritage (3.7% compared with the Buckinghamshire average of 3.3%) but a lower proportion mentioned traditional/quaintness (3.6% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table C9.

Table C9 - Environment and ambience - satisfaction v dissatisfaction in Chesham (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	9.8	-4.3	5.5	16.7
Street cleanliness/maintenance	5.3	0	5.3	3.2
Atmosphere/friendliness	2.8	0	2.8	6.0
Undercover shopping	1.1	0	1.1	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

7.24 When compared with the Buckinghamshire average, Chesham has lower levels of satisfaction with the environment and atmosphere/friendliness, but higher levels of satisfaction with street cleanliness/maintenance and undercover shopping.

Occurrence of crime

7.25 UK Crime Stats indicate there were 1,747 crimes reported in Chesham in the year to November 2022, indicating a crime rate of 81.3 crimes per 1,000 people. This is slightly lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period, but is the 3rd highest rate of crime of the 12 towns assessed in this study, behind only High Wycombe and Aylesbury.

7.26 Of the household survey respondents who had visited Chesham in the last six months, 1.2% mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- There are two large food supermarkets suitable for both bulk and top-up shopping.
- The centre has a reasonable range and choice of comparison goods shops, particularly small independent outlets.
- The centre has a relatively low shop vacancy rate, below the Buckinghamshire and UK averages, which suggests operator demand is broadly in line with the supply of premises.
- A relatively strong non-retail service sector, particularly financial services, estate agents and hair/beauty outlets.
- The Elgiva Theatre attracts additional leisure and entertainment visitors to the centre and Lowndes Park.
- Chesham has higher levels of satisfaction with the street market than the Buckinghamshire average.
- The centre has higher levels of satisfaction with other services than the Buckinghamshire average.
- Chesham has higher levels visitor satisfaction with disabled access, train services, the amount of car parking and pedestrianised/traffic free areas than the Buckinghamshire average.

- The clock tower, Market Square and pedestrianised section of High Street provide an attractive shopping environment including attractive public art.

Weaknesses

- Chesham has a relatively small, localised catchment area. The centre falls within the sub-regional catchment areas of High Wycombe and Hemel Hempstead.
- There is a significant under-provision of clothing/footwear shops.
- Chesham has higher levels of net dissatisfaction with shopping provision than the Buckinghamshire average.
- Chesham has higher levels of net dissatisfaction with pubs/bars, financial services and leisure facilities, than the Buckinghamshire average.
- The St Mary's Way ring road separates the town centre from Lowndes Park, The Elgiva Theatre and residential areas to the west.
- The sense of arrival at the railway station is relatively poor and could be better connected to the town centre.
- Retail rental levels are relatively weak for a centre of its size.
- The town has the 3rd highest crime rate and the 4th worst perception of security and safety in Buckinghamshire.
- Chesham has higher levels of visitor dissatisfaction with bus services.
- The centre is rated below average by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Opportunities

- The Regeneration Bucks – Transforming for the Future and the Chesham Regeneration Strategy identify Chesham as an historic and unique market town, rich in culture. The town centre has key opportunities for development and investment and will be a focus for resources.
- More signage and town maps could be provided. Signage and linkages between the station area and the town centre could be improved, increasing trade from commuters.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- There is an opportunity to build-on and further strengthen the evening/night-time economy, as identified in the Regeneration Strategy.
- Vacant premises in the High Street are suitable for new operators and should help to attract investment in the future e.g. the closure of the M&Co has potential for new uses, redevelopment and public realm improvements.

Threats

- The closure of the M&Co store may reduce footfall in the core section of the High Street, impacting on neighbouring uses.

- The presence of banks and building societies has reduced and may continue to be affected by the national trend of branch closures in the future.
- The number of comparison shops has fallen in recent years. The continuation of this trend could lead to a higher vacancy rate and undermine the vitality and viability of the centre.
- Chesham has a relatively small number of national multiples which could continue to decline due to national market difficulties, increased on-line shopping and the polarisation of national multiple in larger centres such as High Wycombe and Hemel Hempstead.

Future priorities

Table C10 Chesham Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Medium
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Low
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Medium
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Medium
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Medium
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Medium
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Medium
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	Medium
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Medium
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	High

Appendix 8 High Wycombe health check

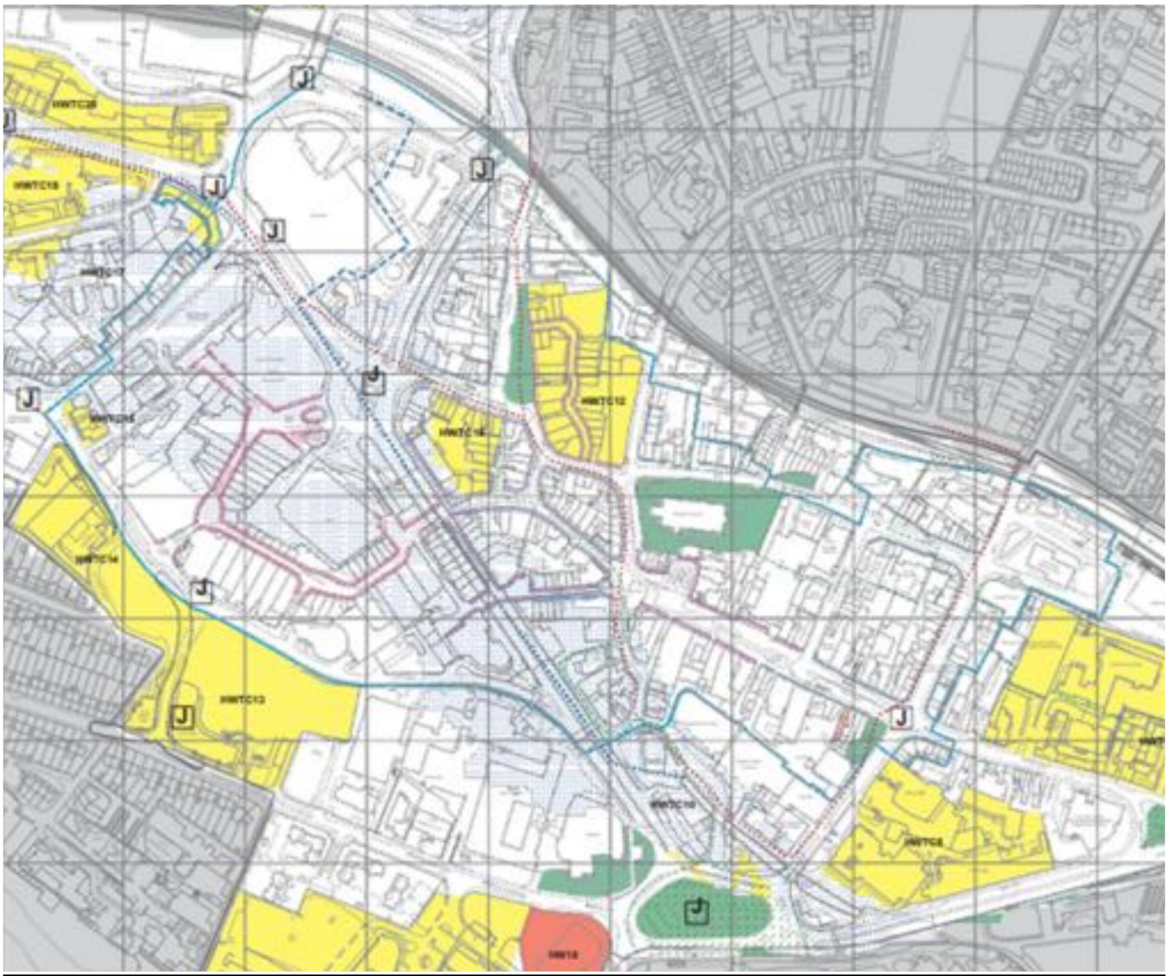
High Wycombe

Introduction

8.1 High Wycombe Town Centre is designated as a *'Sub-Regional Town Centre'* within the Wycombe District Local Plan (adopted 2019), which placed it at the top of the retail hierarchy of centres for the Wycombe plan area.

8.2 The Adopted Local Plan identifies a Primary Shopping Area (PSA) and a wider town centre boundary, as shown in Figure HW below. The PSA comprised primary and secondary shopping frontages. The primary shopping frontages are focused within the Eden and Chilterns Shopping Centres, Octagon Parade, High Street West, White Hart Street South and Oxford Street South.

Figure HW - High Wycombe Town Centre Primary Shopping Area Boundary



Source: Wycombe District Local Plan (August 2019) Proposals Map.

8.3 The secondary frontages include peripheral shopping streets including Bridge Street, Castle Street, Crendon Street, Desborough Road, Frogmoor, High Street East and Oxford Street North. The wider town centre boundary includes the railway station, Buckinghamshire New University, Wycombe Hospital and employment areas along Easton Street and to the west of the centre. The PSA is a relatively compact area providing natural circuits for pedestrians.

Mix of uses

8.4 High Wycombe has 414 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 121,720 sq.m gross, an average of 294 sq.m gross per unit. High Wycombe is the largest centre in Buckinghamshire. There is a regular street market on Tuesdays, Wednesdays and Thursdays with about 40 stalls. The diversity of uses within the centre is set out in Table HW1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table HW1 - Mix of shops/service units in High Wycombe Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	25	6.0	7.4	9.8
Comparison goods retail	110	26.6	31.2	28.8
Financial/professional services	40	9.7	9.4	8.9
Restaurants/Cafés	35	8.5	10.6	10.2
Pubs/Bars	18	4.3	4.4	5.0
Hot food takeaways	37	8.9	5.0	6.3
Other non-retail services	69	16.7	19.5	16.6
Vacant	80	19.3	12.6	14.4
Total	**414**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for High Wycombe (July 2022).

8.5 The centre's mix of units is similar to the national average, but there is a high proportion of hot food takeaways and a low proportion of convenience goods outlets. However, food stores suitable for bulk and top-up food and grocery shopping is strong with large Sainsbury's, Tesco and Iceland stores. The amount of comparison goods floorspace is significantly above the Buckinghamshire and UK average due to large variety stores e.g. B&M Bargains, Marks & Spencer, House of Fraser (which closed in January 2023) and Primark.

8.6 The proportion of comparison goods retailers (26.6%) has significantly fallen since the health check undertaken for the 2014 Wycombe Town Centres & Retail Study (42.5%). The number of comparison good shops has reduced by 49 outlets.

8.7 Vacancies (80 units equates to 19.3%) are also significantly higher than the Buckinghamshire and UK averages. However, a large number (18 units) of the vacant units recorded by Goad in July 2022 were under alteration, which suggests the vacancy rate will have fallen since this survey. There were 13 units recorded as under alteration on the first floor in the Gallery area of the Eden Shopping Centre. There is also a high concentration of vacant units (10 units) in the Chilterns Shopping Centre, which has had a high vacancy rate for many years, but redevelopments are now proposed. Other concentrations of vacant units are on the periphery of the centre, including Collins House, Desborough Road (6 units), the north end of Crendon Street (6 units) and the south side of Oxford Street (6 units).

8.8 The vacancy rate was slightly higher than the proportion recorded in 2014 (16.6%). The number of vacant shop units has increased by 18 units from 62 to 80 units. The total proportion of vacant floorspace in the centre remains below the national average, because vacant units in the centre tend to be smaller premises (averaging 214 gross sq.m per unit). More recent (quarter 1- 2023) information collected by the Council's Economic Growth and Regeneration department suggests the number of vacant units was only 47 units.

Table HW2 - Mix of shops/service floorspace in High Wycombe Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	16,230	13.3	17.7
Comparison goods retail	57,970	47.6	33.9
Financial/professional services	6,890	5.7	7.3
Restaurants/Cafés	7,280	6.0	7.2
Pubs/Bars	4,250	3.5	6.5
Hot food takeaways	4,680	3.8	3.4
Other non-retail services	7,260	6.0	8.6
Vacant	17,160	14.1	15.4
Total	**121,720**	**100.0**	**100.0**

Source: Experian Goad for High Wycombe (July 2022).

Retailer representation

8.9 Despite the significant reduction in the number of comparison goods since 2014, High Wycombe still has the highest provision in Buckinghamshire (110 outlets). All the Goad categories except cars/motorcycles/accessories are represented. The choice of outlets in most categories is reasonable. High Wycombe has a particularly strong provision of mobile telephone shops (listed under electrical), chemists/opticians and toys/hobby/sports shops.

Table HW3 - Mix of comparison goods stores in High Wycombe Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	23	20.9	27.0	21.1	24.2
Furniture, carpets and textiles	5	4.5	2.4	7.6	7.9
Books, arts, cards and stationers	6	5.5	3.9	6.2	4.1
Electrical, music and photography	15	13.6	2.8	9.4	5.0
DIY, hardware and homeware	3	2.7	4.7	7.0	13.0
China, glass and gifts	4	3.6	1.3	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	18	16.4	6.8	12.0	10.4
Variety, department and catalogue	4	3.6	40.8	1.6	12.2
Florists, nurserymen and seedsmen	2	1.8	0.2	2.3	0.9
Toys, hobby, cycle and sports	12	10.9	5.7	5.4	5.8
Jewellers	6	5.5	1.1	5.1	2.2
Charity and second-hand shops	6	5.5	2.3	9.8	6.6
Other comparison goods retailers	6	5.5	0.9	5.5	3.2
Total	**110**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for High Wycombe (July 2022).

8.10 Compared with other centres in Buckinghamshire, High Wycombe has an excellent provision of national multiple comparison retailers (excluding charity shops). The multiple comparison retailers include:

Table HW4 - High Wycombe's comparison multiples

Argos	Ernest Jones	Next	Superdrug
B&M Bargains	F Hinds	O2	Superdry
Beaverbrooks	Game	Pandora	T K Maxx
Blacks	H&M	Phone mart	The Body Shop
Boots	HMV	Poundland	The Fragrance Shop
Card Factory	JD Sports	Primark	The Perfume Shop
Cards Direct	Lids	River Island	Three
CeX Entertainment exchange	Lloyds Pharmacy	Savers	Vision Express
Claire`s	Lush	Schuh	Vodafone
Clarks	Magnet	Shoe Zone	Warren James
Clintons	Marks & Spencer	Skechers	Waterstones
Deichmann	Menkind	Specsavers	Zara
EE	New Look	Sports Direct	

Source: Experian Goad for High Wycombe (July 2022).

8.11 The household survey respondents were asked what they like about High Wycombe town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table HW5.

Table HW5 - Shopping provision - satisfaction v dissatisfaction in High Wycombe (% of respondents visiting centre

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	9.2	-8.6	0.6	1.1
Food shops (bakers/butchers/grocers)	0.3	-3.3	-3.0	-2.4
Clothing shops	5.2	-6.5	-1.3	-5.1
Quality of shops	3.5	-4.1	-0.6	0.2
High street multiples	8.9	-10.3	-1.4	-2.2
Independent/specialist shops	1.0	-8.6	-7.6	3.7
Affordability of shops	6.1	-5.3	0.8	-3.3
Street market	0.8	-2.9	-2.1	1.3
Supermarkets	2.4	-2.4	0.0	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

8.12 When compared with the Buckinghamshire average, High Wycombe has higher levels of net dissatisfaction with food shops, quality of shops, independent specialist shops and the street market. However there is a higher level of satisfaction with the affordability of shops.

Non-retail services

8.13 High Wycombe also has the strongest service sector in Buckinghamshire (comprising 199 units in total) with all the main Goad categories represented. High Wycombe has an above average provision of hot food takeaways and estate agents.

8.14 There is a good mix of independent and multiple food/beverage outlets. Multiples include: Caffe Nero, Costa Coffee, Nando's, Pizza Express, Wagamama, Starbucks, Yo Sushi, and Zizzi. Other non-retail and community facilities include council offices, cinema, bowling alley, dentists, community centres, library, health centre, theatre, a nightclub and health/fitness clubs.

8.15 The household survey results also show conflicting views in relation to non-retail, as shown in Table HW7.

Table HW6 - Mix of service uses in High Wycombe Town Centre

Type of Unit	**Unit (No.)**	**Unit (%)**	**Floorspace (%)**	**UK unit ave. (%)**	**UK space ave. (%)**
Restaurants/cafés	35	19.7	25.8	24.3	24.6
Hot food/takeaways	37	20.8	16.6	15.0	11.4
Pubs/bars	18	10.1	15.0	11.9	22.0
Banks/other financial services	18	10.1	14.8	7.9	11.3
Betting shops/casinos/amusement	7	3.9	6.0	3.7	6.7
Estate agents/valuers	17	9.6	8.0	7.7	6.2
Travel agents	1	0.6	0.6	1.4	1.1
Hairdressers/beauty parlours	43	24.2	12.7	26.5	15.5
Launderettes/dry cleaners	2	1.1	0.6	1.6	1.1
Sub-total	**178**	**100.0**	**100.0**	**100.0**	**100.0**
Other	21				
Total	**199**				

Source: Experian Goad for High Wycombe (July 2022).

Table HW7 - Non-retail services - satisfaction v dissatisfaction in High Wycombe (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	5.0	-4.9	0.1	11.0
Pubs / bars	0.5	-2.2	-1.7	0.1
Financial services	1.1	-1.2	-0.2	-1.4
Other services	1.4	-0.9	0.5	1.0
Leisure facilities	3.7	-3.6	0.1	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

8.16 When compared with the Buckinghamshire average, High Wycombe has higher levels of net dissatisfaction with pubs/bars, but higher levels of satisfaction with other services.

Catchment area

8.17 The household survey results indicate 52% of respondents across the study area had visited shops, services or leisure facilities at High Wycombe town centre in the last six months, the highest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was 10%, also the highest figure in the County. The retail capacity analysis suggests High Wycombe attracts 32% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from 12 zones in the central and southern area of the study area.

8.18 The combined base year turnover of High Wycombe is estimated to be £1,142 million, the highest turnover in Buckinghamshire. High Wycombe's turnover is split £349 million for convenience retail goods, £666 million for comparison retail goods and £127 million for food/beverage.

8.19 High Wycombe has an extensive sub-regional catchment area.

Rental levels

8.20 According to the VOA, High Wycombe only has the =7th highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £420 per sq.m, below the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are relatively weak for a centre of its size and may indicate occupier demand is low compared with the supply of available premises. Zone A rents range from £80 per sq.m in the secondary areas to £420 per sq.m in the prime pitch in Friars Square. In the Eden Shopping Centre and the High Street Zone A rents range from £360 to £375 per sq.m.

Accessibility

8.21 High Wycombe Railway Station is located to the northeast of the town centre. High Wycombe bus station is located to the west of the Eden Shopping Centre on Bridge Street. Bus stops are located throughout the town centre on Amersham Hill, Castle Street, Crendon Street, Easton Street, Frogmoor, High Street, Oxford Street and Queen Victoria Street.

8.22 High Wycombe town centre is served by 12 public car parks with a mix of long and short stay spaces. There are 1,472 spaces (41 disabled). Short stay charges are generally £1.10 up to one hour or £2.60 for up to three hours. Long stay car parking is £5.10/£9.10 all day. Car parks are located within or around the periphery of the centre and most are accessible and close to the main shopping area. The Eden Shopping Centre has over 1,600 parking spaces (£1.50 for one hour or £2.00 for up to three hours).

8.23 Of the household survey respondents who had visited High Wycombe in the last six months, the proximity of the centre to home, work or friends/relatives were key attributes visitors mentioned they like about the centre. For High Wycombe, higher proportions of visitors mentioned proximity to home (27.9% compared with the Buckinghamshire average of 20.7%), but perhaps surprisingly less mentioned work (3.5% compared with 4.1%) and friends/relations (3.5% compared with 5.7%).

8.24 These survey respondents were asked what they like about High Wycombe town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table HW8.

Table HW8 - Levels of accessibility - satisfaction v dissatisfaction in High Wycombe (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0.5	-2.2	-1.7	-2.9
Disabled access	0.8	-1.0	-0.2	-0.1
Bus services	2.6	-2.9	-0.2	-0.8
Train services	1.7	-1.1	0.6	0.5
Car parking - amount	7.7	-6.8	0.9	-5.8
Car parking - cost	2.3	-12.1	-9.8	-7.6
Pedestrianised/traffic free areas	1.6	-0.7	0.9	1.2
Centre layout	7.0	-0.7	6.3	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked   2) % saying factor should be improved

8.25 When compared with the Buckinghamshire average, High Wycombe has higher levels of net dissatisfaction with disabled access and the cost of car parking. There appear to be higher levels of net satisfaction with train services, amount of car parking and the layout of the centre.

Environment and ambience

8.26 High Wycombe is anchored by the Eden Shopping Centre, a partially covered mall featuring national multiple retailers and leisure operators in a clean and modern environment. The shopping centre is lined with street furniture and other public displays including a large 'selfie frame' at the time of the site visit. Nonetheless, high profile vacancies somewhat detract from the attraction of the Eden Shopping Centre, as with the Chiltern Shopping Centre. The east of High Wycombe is made up of a more traditional pedestrianised High Street featuring well-maintained shop frontages, wide pavements, street furniture, planters and decorated lampposts. Secondary streets branch off the linear High Street, largely comprising secondary town centre uses.

8.27 Of the household survey respondents who had visited High Wycombe in the last six months, lower proportions of visitors indicated they like the centre's historic character/heritage (1% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (0% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table HW9.

8.28 When compared with the Buckinghamshire average, High Wycombe has higher levels of net dissatisfaction with street cleanliness/maintenance. However there were higher levels of net satisfaction with covered shopping areas. Overall High Wycombe is rated poorly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Table HW9 - Environment and ambience - satisfaction v dissatisfaction in High Wycombe (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	6.1	-6.0	0.1	16.7
Street cleanliness/maintenance	3.1	-6.6	-3.5	3.2
Atmosphere/friendliness	1.3	-0.2	1.1	6.0
Undercover shopping	3.7	-1.0	2.7	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Occurrence of crime

8.29 UK Crime Stats indicate there were 9,451 crimes reported in High Wycombe in the year to November 2022, indicating a crime rate of 124.4 crimes per 1,000 people. This is much higher than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. High Wycombe has the highest rate of crime of the 12 towns assessed in this study. Of the household survey respondents who had visited High Wycombe in the last six months, 2.4% mentioned more security or better personal safety as a required improvement that would make them visit more often. Although this percentage figure is relatively small it was the highest recorded for the 14 centres in Buckinghamshire.

SWOT analysis

Strengths

- The largest centre in Buckinghamshire at the top of the hierarchy. The centre has a relatively extensive sub-regional catchment area.
- A good range and choice comparison goods shops with a strong provision of national multiples, including large anchor stores e.g. Marks & Spencer, Boots and Primark.
- The large Tesco and Sainsbury's stores provide for bulk and top-up food and grocery shopping, supported by Iceland and a Marks & Spencer food hall.
- The primary shopping areas is relatively compact with traffic free and covered shopping areas, providing natural circuits for pedestrians.
- High Wycombe has a good provision of leisure and entertainment facilities including a cinema, theatre and bowling alley.
- High Wycombe has higher levels of satisfaction with the affordability of shops than the Buckinghamshire average.
- High Wycombe has higher levels of satisfaction with other services than the Buckinghamshire average. There is a strong provision of non-retail services, particularly takeaways and estate agents.
- High Wycombe has higher levels of visitor satisfaction with train services, amount of car parking and the layout of the centre than the Buckinghamshire average.

- The Buckinghamshire New University and other education uses attract additional students and visitors to the centre.
- High Wycombe has a well-established Business Improvement District, which has been allocated Future High Streets Funds.

Weaknesses

- High Wycombe has a high shop vacancy rate above the Buckinghamshire and UK averages. The vacancy rate has been high for many years, particularly in the Chilterns Shopping Centre.
- The town has the highest crime rate and worst perception of security and safety in Buckinghamshire.
- High Wycombe has higher levels of net dissatisfaction with food shops, quality of shops, independent specialist shops and the street market when compared with the Buckinghamshire average.
- The centre has higher levels of net dissatisfaction with pubs/bars than the Buckinghamshire average.
- High Wycombe has higher levels of visitor dissatisfaction with disabled access and the cost of car parking than the Buckinghamshire average.
- Retail rental levels are relatively weak for a centre of its size, which with the high vacancy rate, suggests operator demand is lower than the supply of premises.
- High Wycombe is rated poorly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Opportunities

- Many of the vacant units recorded in 2022 were under-alteration, which indicates the centre is attracting new investment. The relatively large number of vacant premises provide opportunities for further investment, including non-retail services and leisure uses. These vacant units should provide opportunities for the centre to evolve e.g. leisure and experiential retail uses.
- Lower levels of visitor satisfaction with the quality of shops, independent specialist shops, the street market and pubs/bars suggest there is latent demand for these types of facilities.
- The vacated House of Fraser store provides an opportunity to attract new uses. In July 2023 the Council agreed to co-funding the repurposing of the House of Fraser store, involving the relocation of Primark into Eden, strengthening its footfall.
- The comprehensive redevelopment of the existing Primark building and the adjacent Chiltern Shopping Centre, for a mixed-use scheme including about 300 apartments (subject to planning) will remove redundant retail floorspace from the town centre and improve activity.

Threats

- The recent closure of House of Fraser may reduce footfall in the Eden Shopping Centre, affecting nearby uses.
- Continuing national market difficulties and increase on-line shopping could continue to reduce retail operator demand for space in the centre.
- The longer-term impact of the cost of living crisis and Brexit may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.
- The number of comparison shops has fallen in recent years. The continuation of this trend could lead to a higher vacancy rate and undermine the vitality and viability of the centre.

Future priorities

Table HW10 High Wycombe Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Low
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	High
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Low
Necessities Car-parking; Amenities; General Facilities	Low
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Low
Merchandise Range/quality of goods; assortments; merchandising	Low
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Low
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Low
Accessibility Accessibility; convenience; public transport	Low
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Low
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Medium
Recreational Space Recreational areas; public space; open space	Medium
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Low
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	High
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	Medium
Liveable Multi/mono-functional; liveability; personal services; mixed use	Low
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Low
Innovation Opportunities to experiment; retail innovation	High

Appendix 9 Amersham Old Town health check

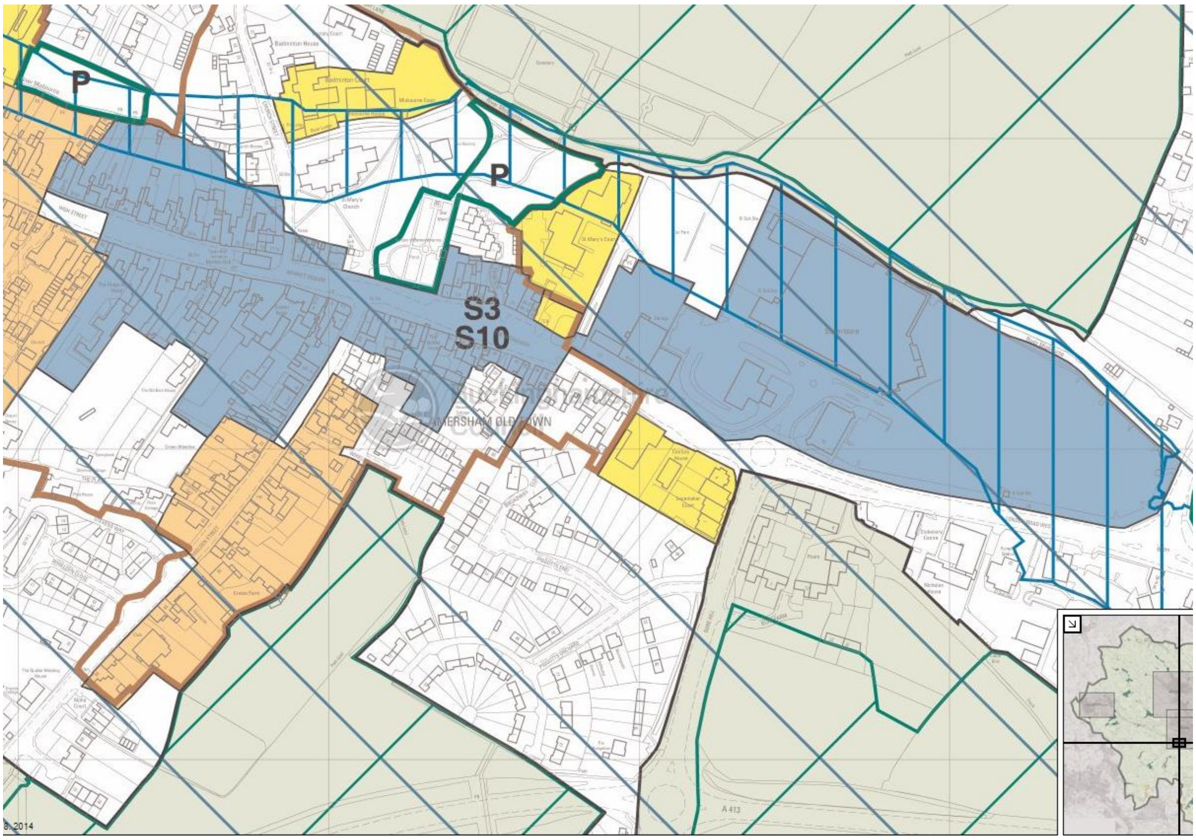
Amersham Old Town

Introduction

9.1 Amersham Old Town is designated as a *'Local Centre'* in the Chiltern District Local Plan (adopted 1997 and Consolidated September 2007 and November 2011), which placed it in the second tier of the retail hierarchy of centres for the Chiltern plan area. The designated Shopping boundary is shown in Figure AOT. Most of the designated Shopping Area is within a Conservation Area.

9.2 The designated Shopping Area includes the Tesco store and its car park, The Broadway, Market Square, Whielden Street and the High Street (up to number 69). The centre is linear stretching approximately 400 metres east to west. It is located over a kilometre to the south of Amersham on the Hill. The two centres mostly have different but complementary roles.

Figure AOT - Amersham Old Town Centre Boundary



Source: Chiltern Local Plan Proposals Map.

Mix of uses

9.3 Amersham Old Town has 59 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units is 11,494 sq.m gross, but half of this floorspace is provided within the Tesco superstore. Amersham Old Town (including the Tesco store) is the 10th largest centre in Buckinghamshire. There is a small street market (8 stalls) on Saturdays and a monthly artisan market. The diversity of uses within the centre is set out in Table AOT1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table AOT1 - Mix of shops/service units in Amersham Old Town

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	3	5.1	7.4	9.8
Comparison goods retail	25	42.4	31.2	28.8
Financial/professional services	2	3.4	9.4	8.9
Restaurants/Cafés	13	22.0	10.6	10.2
Pubs/Bars	4	6.8	4.4	5.0
Hot food takeaways	0	0.0	5.0	6.3
Other non-retail services	7	11.9	19.5	16.6
Vacant	5	8.5	12.6	14.4
Total	**59**	**100.0**	**100.0**	**100.0**

Source: Lichfields' survey for Amersham Old Town (April 2023).

9.4 The centre's mix of units is significantly different to the Buckinghamshire and national averages. There is a high representation of restaurants/cafés, pubs/bars, but a low representation of financial/professional services, hot food takeaways and other non-retail services. Restaurants/cafés take up almost twice the national average proportion of floorspace.

9.5 The provision of comparison goods outlets is relatively high for a centre of its size. The convenience goods sector is dominated by the large Tesco superstore and the proportion of convenience goods retail is a very high. The Tesco superstore also offers a good range of comparison goods products. There are only two other small convenience goods shops i.e. a cheese shop and grocer.

9.6 There were only five vacant units at the time of Lichfields' survey and the vacancy rate is significantly lower than the Buckinghamshire ad UK averages. These vacant units are small (average of 59 sq.m). Quarter 1 - 2023 information collected by the Council's Economic Growth and Regeneration department also suggests five vacant units.

Table AOT2 - Mix of shops/service floorspace in Amersham Old Town

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	5,910	51.4	17.7
Comparison goods retail	2,634	22.9	33.9
Financial/professional services	74	0.6	7.3
Restaurants/Cafés	1,944	16.9	7.2
Pubs/Bars	343	3.0	6.5
Hot food takeaways	0	0.0	3.4
Other non-retail services	296	2.6	8.6
Vacant	293	2.5	15.4
Total	**11,494**	**100.0**	**100.0**

Source: Lichfields' survey for Amersham Old Town (April 2023) and VOA floorspace data.

Retailer representation

9.7 Amersham Old Town has a reasonable number of comparison shops (25) for a centre of its size, but most of these outlets are small independent clothing/footwear shops. Six of the 14 Goad categories are not represented in the centre and the choice of outlets in most represented categories is limited (one or two outlets). Overall, the mix and choice of comparison goods outlets is limited, apart from clothing/footwear and furniture/ carpet shops.

Table AOT3 - Mix of comparison goods stores in Amersham Old Town

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	14	56.0	63.4	21.1	24.2
Furniture, carpets and textiles	4	16.0	24.0	7.6	7.9
Books, arts, cards and stationers	0	0.0	0.0	6.2	4.1
Electrical, music and photography	0	0.0	0.0	9.4	5.0
DIY, hardware and homeware	0	0.0	0.0	7.0	13.0
China, glass and gifts	1	4.0	1.9	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	1	4.0	2.0	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	0	0.0	0.0	2.3	0.9
Toys, hobby, cycle and sports	1	4.0	1.9	5.4	5.8
Jewellers	2	8.0	4.4	5.1	2.2
Charity and second-hand shops	1	4.0	1.8	9.8	6.6
Other comparison goods retailers	1	4.0	0.6	5.5	3.2
Total	**25**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Lichfields' survey for Amersham Old Town (April 2023).

9.8 Amersham Old Town has very few national multiple comparison retailers (excluding charity shops), but its strength is good quality independent specialists. Clothing multiples present include Phase Eight and Mountain Warehouse at Fox's.

9.9 The household survey respondents were asked what they like about Amersham Old Town and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table AOT4.

Table AOT4 - Shopping provision - satisfaction v dissatisfaction in Amersham Old Town (% of respondents visiting centre

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	3.4	-2.1	1.3	1.1
Food shops (bakers/butchers/grocers)	1.7	-3.0	-1.3	-2.4
Clothing shops	2.7	-3.9	-1.2	-5.1
Quality of shops	4.8	-2.6	2.2	0.2
High street multiples	3.1	-4.0	-0.9	-2.2
Independent/specialist shops	14.8	-3.8	11.0	3.7
Affordability of shops	1.9	-7.8	-5.9	-3.3
Street market	0.6	-0.7	-0.1	1.3
Supermarkets	2.6	-2.7	-0.1	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

9.10 When compared with the Buckinghamshire average, Amersham Old Town has higher levels of net dissatisfaction with the affordability of shops, the street market and supermarkets. However there are higher level of satisfaction with non-food shops, quality of shops and independent/specialist shops.

Non-retail services

9.11 Amersham Old Town has a relatively under-represented service sector when compared with other centres in Buckinghamshire (comprising only 26 units in total). As indicated, the centre has a good representation of restaurants/cafés and pubs/bars. There is limited or no choice in other main service categories. The food/beverage outlets are independent businesses except for Costa Coffee (in the Tesco store). Other non-retail and community facilities include a nursery, dentist, petrol station and museum. The household survey results also show conflicting views in relation to non-retail, as shown in Table AOT6

Table AOT5 - Mix of service uses in Amersham Old Town

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK floorspace ave. (%)
Restaurants/cafés	13	56.5	75.7	24.3	24.6
Hot food/takeaways	0	0.0	0.0	15.0	11.4
Pubs/bars	4	17.4	13.4	11.9	22.0
Banks/other financial services	1	4.3	1.9	7.9	11.3
Betting shops/casinos/amusement	1	4.3	1.9	3.7	6.7
Estate agents/valuers	1	4.3	0.9	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	3	13.0	6.1	26.5	15.5
Launderettes/dry cleaners	0	0.0	0.0	1.6	1.1
Sub-total	**23**	**100.0**	**100.0**	**100.0**	**100.0**
Other	3				
Total	**26**				

Source: Lichfields' survey for Amersham Old Town (April 2023).

Table AOT6 Non-retail services - satisfaction v dissatisfaction in Amersham Old Town (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	27.9	-3.6	24.3	11.0
Pubs / bars	7.2	-2.6	4.5	0.1
Financial services	0.0	-2.5	-2.5	-1.4
Other services	1.5	-2.3	-0.8	1.0
Leisure facilities	2.4	-1.9	0.5	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

9.12 When compared with the Buckinghamshire average, Amersham Old Town has higher levels of net dissatisfaction with financial services and other services, but higher levels of satisfaction with cafés/restaurants, pubs/bars and leisure facilities.

Catchment area

9.13 The household survey results indicate 20% of respondents across the study area had visited shops, services or leisure facilities at Amersham Old Town in the last six months, the fifth highest percentage for the 14 assessed main centres in Buckinghamshire. These figures are likely to include visits to the Tesco store as well as the high street. The proportion of respondents who do most of their non-food shopping was 2%, the third highest behind High Wycombe and Aylesbury. The retail capacity analysis suggests Amersham Old Town attracts 0.8% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from only two zones in the east of the study area.

9.14 The combined base year turnover of Amersham Old Town is estimated to be £126 million, the fifth highest turnover in Buckinghamshire, but this includes the large Tesco superstore. Amersham Old Town's turnover is split £71 million for convenience retail goods, £16 million for comparison retail goods and £39 million for food/beverage.

9.15 Amersham Old Town has a relatively localised catchment area, but it has a strong draw for food/grocery shopping at the Tesco store and good food/beverage trade drawn to restaurants/cafés.

Rental levels

9.16 According to the VOA, Amersham Old Town has the 3rd highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £725 per sq.m, significantly above the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are very strong for a centre of its size and may indicate occupier demand is well above the supply of available premises. Zone A rents range from £440 to £725 per sq.m in the prime pitch.

Accessibility

9.17 Amersham Railway Station is over a kilometre to the north of Amersham Old Town and is an uphill walk. Bus stops are located on the Broadway near Tesco, Gore Hill and on Whielden Street.

9.18 Amersham Old Town has one public car park with 196 spaces (10 disabled). Short stay charges are £0.80 up to one hour or £2.10 for up to three hours. Long stay car parking is

£3.70 over 4 hours. This car park is located close to the main shopping area. The Tesco superstore has free car parking for up to 3 hours but is a 250-metres walk from the edge of the main shopping area.

9.19 Of the household survey respondents who had visited Amersham Old Town in the last six months, the proximity of the centre to home, work or friends/relatives were less important attributes visitors mentioned when compared with other centres in Buckinghamshire. Lower proportions of visitors mentioned proximity to home (16.4% compared with the Buckinghamshire average of 20.7%), work (0% compared with 4.1%) and friends/relations (4.3% compared with 5.7%).

9.20 These survey respondents were asked what they like about Amersham Old Town and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table AOT7.

Table AOT7 Levels of accessibility - satisfaction v dissatisfaction in Amersham Old Town (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-0.9	-0.9	-2.9
Disabled access	1.1	-1.5	-0.4	-0.1
Bus services	1.1	-2.4	-1.3	-0.8
Train services	1.0	0	1.0	0.5
Car parking – amount	4.0	-10.9	-6.9	-5.8
Car parking – cost	1.1	-10.1	-9.0	-7.6
Pedestrianised/traffic free areas	0.4	-1.7	-1.4	1.2
Centre layout	0.5	0	0.5	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

9.21 When compared with the Buckinghamshire average, Amersham Old Town appears to have higher levels of net dissatisfaction with disabled access, bus services, the amount and cost of car parking and pedestrianised/traffic free areas. There appear to be higher levels of net satisfaction only with train services.

Environment and ambience

9.22 Amersham Old Town is a very attractive historic centre with many period buildings. The Memorial Gardens are in the heart of the centre and provide a place to relax and enjoy. The centre has wide and well maintained pavements, with only small narrow sections. Linkages and signage between the centre and the Tesco superstore could be improved. Medium levels of traffic flow do not significantly impact on the overall ambience for pedestrians.

9.23 Of the household survey respondents who had visited Amersham Old Town in the last six months, higher proportions of visitors indicated they like the centre's historic character/heritage (6.0% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (16.3% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table AOT8.

Table AOT8 - Environment and ambience - satisfaction v dissatisfaction in Amersham Old Town (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	31.0	-0.4	30.6	16.7
Street cleanliness/maintenance	8.2	-1.1	7.1	3.2
Atmosphere/friendliness	6.1	0.0	6.1	6.0
Undercover shopping	0.4	-0.7	-0.3	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

9.24 When compared with the Buckinghamshire average, Amersham Old Town has higher levels of net dissatisfaction with under-covered shopping areas. Levels of net satisfaction were higher for the environment and street cleanliness/maintenance than the Buckinghamshire average. Overall Amersham Old Town is rated highly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Occurrence of crime

9.25 UK Crime Stats indicate there were 893 crimes reported in Amersham (including Amersham on the Hill) in the year to November 2022, indicating a crime rate of 62.1 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Amersham has the 5th lowest rate of crime of the s assessed in this study.

9.26 Of the household survey respondents who had visited Amersham Old Town in the last six months, only 0.3% mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Amersham Old Town is an attractive and healthy centre with a strong village feel.
- It has a strong provision of clothing/footwear shops for a centre of its size.
- It is locally distinct in that it provides a high quality niche market of independent and national retailers and restaurants, serving both the local and visitor markets.
- The buildings in the centre are predominantly attractive period buildings.
- The centre has a relatively low shop vacancy rate, below the Buckinghamshire and UK averages, which suggests operator demand is broadly in line with the supply of premises.
- Amersham Old Town has higher levels of satisfaction with non-food shops, quality of shops and independent/specialist shops than the Buckinghamshire average.

- Amersham Old Town has higher levels of satisfaction with cafés/restaurants, pubs/bars and leisure facilities than the Buckinghamshire average.
- The town has the 5th lowest crime rate in Buckinghamshire and a good perception of security and safety.
- Retail rental levels are relatively high for a centre of its size and are the third highest in Buckinghamshire, which, with the low vacancy rate, suggests a relatively strong market for premises.
- Amersham Old Town has higher levels of visitor satisfaction with train services than the Buckinghamshire average.
- Amersham Old Town is rated highly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire. The Memorial Gardens add to the appearance of the centre.

Weaknesses

- The third smallest centre in Buckinghamshire with a limited number of shops. The range and choice of comparison goods shops is limited.
- The centre has a small, localised catchment area, which falls within the sub-regional catchment area of High Wycombe and Watford.
- The centre has a small number of convenience retailers, but this may be explained by the large Tesco store on the periphery of the centre.
- There are no banks or building societies in the centre.
- The pavements are narrow in places.
- Shop units are primarily period buildings that are narrow and limited in size.
- Amersham Old Town has higher levels of net dissatisfaction with the affordability of shops, the street market and supermarkets when compared with the Buckinghamshire average.
- Amersham Old Town has higher levels of net dissatisfaction with financial services and other services than the Buckinghamshire average.
- Amersham Old Town has higher levels of visitor dissatisfaction with disabled access, bus services, the amount and cost of car parking and pedestrianised/traffic free areas than the Buckinghamshire average.

Opportunities

- The Tesco superstore attracts many customers. Improved linkages to and from the store to the rest of the town centre could increase footfall and spin off trade. Linkages with Amersham on the Hill could also be improved. For example, better signage to and from Amersham on the Hill and the Tesco superstore could help to increase linked trips between the two centres and food store.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.

- The centre's strong food/beverage offer provides an opportunity to enhance the evening economy, subject to acceptable impacts on residential amenity.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract retailers/operators due to the lack of modern units.
- The historic character of the town centre, particularly in terms of the conservation area designation and listed buildings, could restrict future development proposals.

Future priorities

Table AOT9 Amersham Old Town Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	High
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Low
Appearance Visual appearance; cleanliness; ground floor frontages	Low
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Medium
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	High
Merchandise Range/quality of goods; assortments; merchandising	High
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Medium
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Medium
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	High
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Low
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	High
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

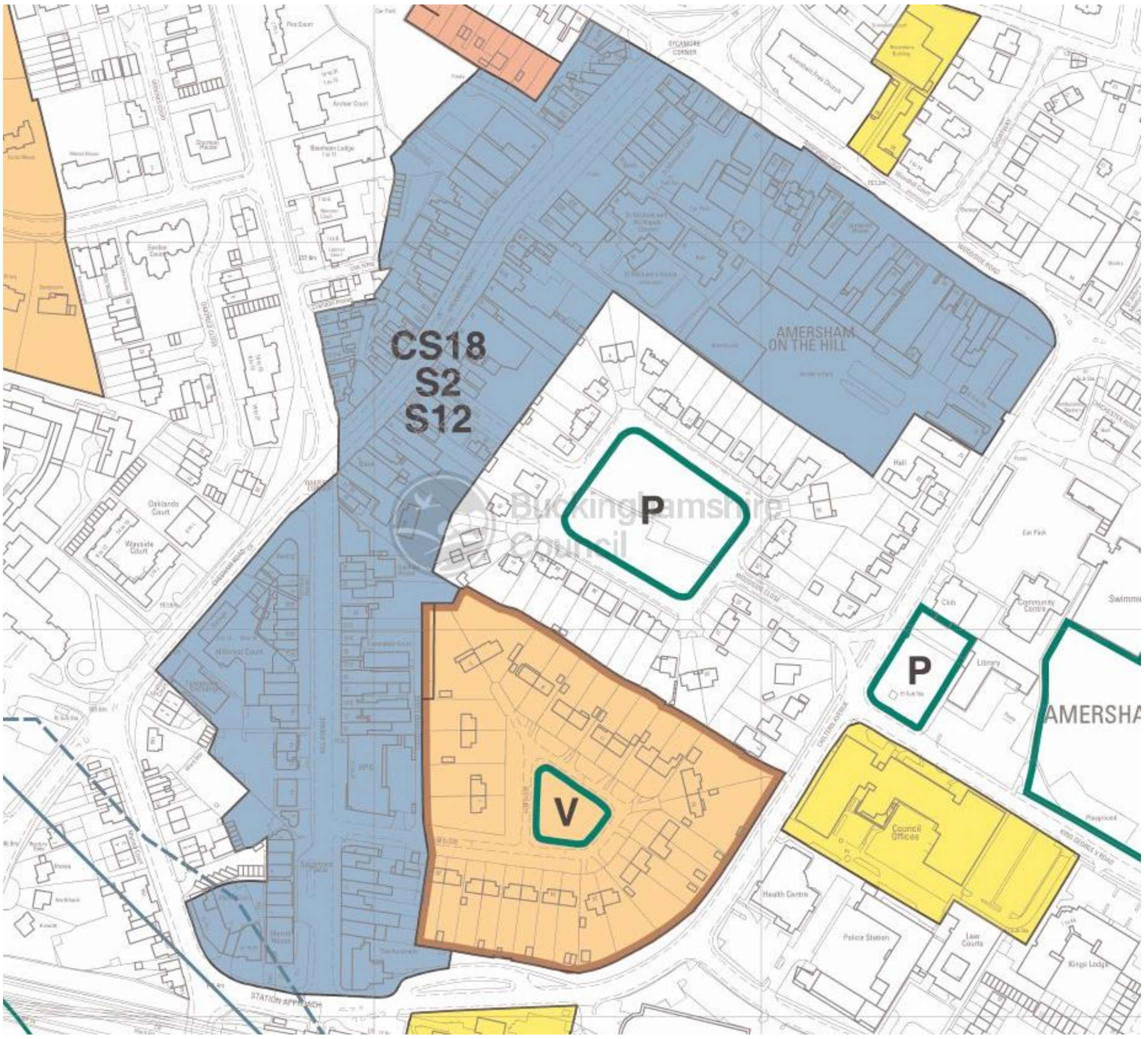
Appendix 10 Amersham on the Hill health check

Amersham on the Hill

Introduction

10.1 Amersham on the Hill is designated as a *'District Centre'* in the Chiltern District Local Plan (adopted 1997 and Consolidated September 2007 and November 2011), which placed it at the top of the retail hierarchy of centres for the Chiltern plan area. The centre is L-shaped stretching along Hill Avenue, Sycamore Road and Woodside Road. The centre is linear stretching approximately 600 metres. It is located over a kilometre to the north of Old Amersham. The centres mostly have different but complementary roles.

Figure 9 Amerham on the Hill Town Centre Boundary



Source: Chiltern Local Plan Proposals Map.

Mix of uses

10.2 Amersham on the Hill has 160 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 22,620 sq.m gross, an average of 141 sq.m gross per unit. Amersham on the Hill is the sixth largest centre in Buckinghamshire. There is a weekly street market on Tuesdays. The diversity of uses within the centre is set out in Table AH1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table AH1 Mix of shops/service units in Amersham on the Hill Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	14	8.8	7.4	9.8
Comparison goods retail	57	35.6	31.2	28.8
Financial/professional services	19	11.9	9.4	8.9
Restaurants/Cafés	18	11.3	10.6	10.2
Pubs/Bars	3	1.9	4.4	5.0
Hot food takeaways	9	5.6	5.0	6.3
Other non-retail services	32	20.0	19.5	16.6
Vacant	8	5.0	12.6	14.4
Total	**160**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Amersham on the Hill (August 2022).

10.3 The centre's mix of units is broadly in line with the Buckinghamshire and national averages although there is an under-representation of pubs/bars. The provision of comparison good shops and floorspace is relatively high for a centre of its size. Consistent with the national trend, the proportion of comparison goods shops has decreased from 49% in 2016 to 35.6%, based on information within the 2017 Chiltern and South Bucks Retail Study.

10.4 There were only 8 vacant units at the time of Goad's survey in 2022 and the vacancy rate (5%) is significantly lower than the Buckinghamshire and UK averages. The vacancy rate is lower than the proportion recorded in 2016 (6.6%). More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests the number of vacant units was 7 vacant units.

Table AH2 - Mix of shops/service floorspace in Amersham on the Hill Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	3,130	13.8	17.7
Comparison goods retail	8,320	36.8	33.9
Financial/professional services	2,500	11.1	7.3
Restaurants/Cafés	2,400	10.6	7.2
Pubs/Bars	780	3.4	6.5
Hot food takeaways	790	3.5	3.4
Other non-retail services	3,570	15.8	8.6
Vacant	1,130	5.0	15.4
Total	**22,620**	**100.0**	**100.0**

Source: Experian Goad for Amersham on the Hill (August 2022).

10.5 Convenience units take up a slightly lower proportion of floorspace than the UK average. The main food stores are relatively small and not ideal for bulk food and grocery shopping trips e.g. Little Waitrose, Marks & Spencer and Tesco Express. These main food stores are supported by a Majestic Wine, Greggs, Holland & Barratt health foods and a small reasonable selection of small specialists baker, deli and grocers.

Retailer representation

10.6 Amersham on the Hill has a reasonable selection of comparison shops (57) for a centre of its size, with only one Goad category not represented in the centre (cars, motorcycles and accessories). However, the choice of outlets in most Goad categories is relatively limited, with the exception of clothing/footwear, chemists/opticians and furniture/carpets/textile shops.

Table AH3 - Mix of comparison goods stores in Amersham on the Hill Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	8	14.0	13.2	21.1	24.2
Furniture, carpets and textiles	10	17.5	18.6	7.6	7.9
Books, arts, cards and stationers	4	7.0	7.2	6.2	4.1
Electrical, music and photography	5	8.8	6.3	9.4	5.0
DIY, hardware and homeware	4	7.0	6.0	7.0	13.0
China, glass and gifts	3	5.3	3.6	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	8	14.0	14.3	12.0	10.4
Variety, department and catalogue	1	1.8	4.1	1.6	12.2
Florists, nurserymen and seedsmen	2	3.5	2.0	2.3	0.9
Toys, hobby, cycle and sports	2	3.5	7.2	5.4	5.8
Jewellers	1	1.8	2.6	5.1	2.2
Charity and second-hand shops	6	10.5	10.8	9.8	6.6
Other comparison goods retailers	3	5.3	4.0	5.5	3.2
Total	**57**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Amersham on the Hill (August 2022).

10.7 Amersham on the Hill has a reasonable provision of national multiple comparison retailers (excluding charity shops) for a centre of its size, with some good quality brands. The multiple comparison retailers include:

Table AH4 - Amerham on the Hill's comparison multiples

Boots Chemist	EE	Robert Dyas	The Entertainer
Card Factory	Fat Face	Specsavers	Waterstones
Clarks	Jojo Maman Bebe	Superdrug	WH Smith

10.8 The household survey respondents were asked what they like about Amersham on the Hill and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table AH5.

Table AH5 - Shopping provision - satisfaction v dissatisfaction in Amersham on the Hill (% of respondents visiting centre)

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Non-food shops	3.4	-2.1	1.3	1.1
Food shops (bakers/butchers/grocers)	1.7	-3.0	-1.3	-2.4
Clothing shops	2.7	-3.9	-1.2	-5.1
Quality of shops	4.8	-2.6	2.2	0.2
High street multiples	3.1	-4.0	-0.9	-2.2
Independent/specialist shops	14.8	-3.8	11.0	3.7
Affordability of shops	1.9	-7.8	-5.9	-3.3
Street market	0.6	-0.7	-0.1	1.3
Supermarkets	2.6	-2.7	-0.1	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

10.9 When compared with the Buckinghamshire average, Amersham on the Hill has higher levels of net satisfaction with non-food shops, quality of shops, high street multiples, independent/specialist shops, affordability and supermarkets.

Non-retail services

10.10 Amersham on the Hill has a strong service sector (comprising 81 units in total) with only betting shops and travel agents not represented in the centre. The choice of restaurants/ cafés, hot food takeaways and hairdressers/beauty parlours is strong. Most of the food/beverage outlets are small independents. Multiples include Pizza Express, Caffe Nero, Costa and KFC. Other non-retail and community facilities include council offices, library, leisure centre, health/fitness clubs, churches, dentists, community halls/clubs and health centres. The household survey results also show conflicting views in relation to non-retail, as shown in Table AH7.

Table AH6 - Mix of service uses in Amersham on the HIll Town Centre

Type of Unit	**Unit (No.)**	**Unit (%)**	**Floorspace (%)**	**UK unit ave. (%)**	**UK space ave. (%)**
Restaurants/cafés	18	27.3	29.8	24.3	24.6
Hot food/takeaways	9	13.6	9.8	15.0	11.4
Pubs/bars	3	4.5	9.7	11.9	22.0
Banks/other financial services	4	6.1	7.3	7.9	11.3
Betting shops/casinos/amusement	0	0.0	0.0	3.7	6.7
Estate agents/valuers	11	16.7	19.8	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	16	24.2	18.4	26.5	15.5
Launderettes/dry cleaners	5	7.6	5.2	1.6	1.1
Sub-total	**66**	**100.0%**	**100.0**	**100.0**	**100.0**
Other	15				
Total	**81**				

Source: Experian Goad for Amersham on the Hill (August 2022).

Table AH7 - Non-retail services - satisfaction v dissatisfaction in Amersham on the Hill (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	16.3	-5.1	11.2	11.0
Pubs / bars	2.4	-1.5	0.9	0.1
Financial services	2.2	-2.5	-0.4	-1.4
Other services	2.8	-1.5	1.4	1.0
Leisure facilities	1.8	-1.6	0.2	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

10.11 When compared with the Buckinghamshire average, Amersham on the Hill has higher levels of net satisfaction with pubs/bars and a similar level of net satisfaction with cafés/restaurants.

Catchment area

10.12 The household survey results indicate 18% of respondents across the study area had visited shops, services or leisure facilities at Amersham on-the-Hill in the last six months, the sixth highest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was only 0.3%. The retail capacity analysis suggests Amersham on-the-Hill attracts 1.7% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from only two zones in the east of the study area.

10.13 The combined base year turnover of Amersham on-the-Hill is estimated to be £90 million, the 9th highest turnover in Buckinghamshire. The centre's turnover is split £28 million for convenience retail goods, £35 million for comparison retail goods and £27 million for food/beverage.

10.14 Amersham on-the-Hill has a relatively small, localised catchment area, but has a good mixed retail and food/beverage trading base.

Rental levels

10.15 According to the VOA, Amersham on the Hill has the 5th highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £550 per sq.m, above the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are relatively strong for a centre of its size and may indicate occupier demand is high compared with the supply of available premises. Zone A rents range from £400 per sq.m in Hill Avenue to £550 in the prime pitch on Sycamore Road.

Accessibility

10.16 Amersham Railway Station is adjacent to the south end of Amersham in the Hill. Bus stops are distributed throughout the centre on Chesham Road, Chiltern Avenue, Hill Avenue and Sycamore Road.

10.17 Amersham on the Hill has four public car parks with 1,851 spaces (63 disabled). Short stay charges are generally £0.80 up to one hour or £2.10 up to three hours. This car parking includes long stay car parking (£6.10) for commuters using the railway station. Car parks are accessible to the main shopping area.

10.18 The environmental quality of Amersham on the Hill is variable. The inter-war buildings along Sycamore Road and Hill Avenue are reasonably attractive. 1960's premises on Sycamore Corner look tired but there are plans to redevelop this area. Traffic is heavy along Chesham Road but is moderate in the main shopping streets. Pavements are generally wide throughout the centre but the quality of paving could be improved in some places.

10.19 Of the household survey respondents who had visited Amersham on the Hill in the last six months, the proximity of the centre to home, work or friends/relatives were important attributes visitors mentioned when compared with other centres in Buckinghamshire. Similar proportions of visitors mentioned proximity to home (20.3% compared with the Buckinghamshire average of 20.7%), work (6.6% compared with 4.1%) and friends/relations (3.1% compared with 5.7%).

10.20 These survey respondents were asked what they like about Amersham on the Hill and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table AH8.

Table AH8 - Levels of accessibility - satisfaction v dissatisfaction in Amersham on the Hill (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-3.6	-3.6	-2.9
Disabled access	0	0	0	-0.1
Bus services	3.0	-1.1	1.9	-0.8
Train services	3.5	-1.1	2.4	0.5
Car parking - amount	5.8	-13.7	-7.9	-5.8
Car parking - cost	2.5	-15.4	-12.9	-7.6
Pedestrianised/traffic free areas	0.9	-1.2	-0.3	1.2
Centre layout	3.9	0	3.9	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

10.21 When compared with the Buckinghamshire average, Amersham on the Hill has higher levels of net dissatisfaction with car accessibility/traffic congestion, the amount and cost of car parking and pedestrianised/traffic free areas. There appear to be higher levels of net satisfaction with bus and train services and the layout of the centre.

Environment and ambience

10.22 Of the household survey respondents who had visited Amersham on the Hill in the last six months, lower proportions of visitors indicated they like the centre's historic character/heritage (0% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (4.0% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table AH9.

Table AH9 - Environment and ambience - satisfaction v dissatisfaction in Amersham on the Hill (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	15.0	0.0	15.0	16.7
Street cleanliness/maintenance	3.1	-1.0	2.1	3.2
Atmosphere/friendliness	5.0	0.0	5.0	6.0
Undercover shopping	0.0	0.9	-0.9	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

10.23 When compared with the Buckinghamshire average, Amersham on the Hill has similar levels of net satisfaction in terms of environment and ambience. However there were higher levels of dissatisfaction with the lack of covered shopping areas. Overall Amersham on the Hill is rated as slightly below average in terms of environmental/ambience net satisfaction when compared with other centres in Buckinghamshire.

Occurrence of crime

10.24 UK Crime Stats indicate there were 893 crimes reported in Amersham (including Amersham Old Town) in the year to November 2022, indicating a crime rate of 62.1 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Amersham has the 5th lowest rate of crime of the 12 towns assessed in this study.

10.25 Of the household survey respondents who had visited Amersham on the Hill in the last six months, none mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- For a centre of its size, Amersham on the Hill has a reasonable number and range of comparison shops, although the choice within some categories of shops is limited. There is a reasonable mix of multiple chain shops and small independent traders.
- The centre benefits from additional trade from commuters passing through the railway station.
- The centre has convenience outlets suitable for basket and top-up shopping, comprising small supermarkets and independent specialist shops.
- The centre has a low shop vacancy rate, below the Buckinghamshire and UK averages, which suggests operator demand is broadly in line with the supply of premises.

- Amersham on the Hill has higher levels of net satisfaction with non-food shops, quality of shops, high street multiples, independent/specialist shops, affordability and supermarkets.
- The centre has a good choice of restaurants/cafés and hairdressers/beauty parlours.
- There is a good provision of community and leisure facilities.
- Amersham on the Hill has higher levels of net satisfaction with pubs/bars than the Buckinghamshire average.
- Retail rental levels are relatively high for a centre of its size and are the 5th highest in Buckinghamshire, which, with the low vacancy rate, suggests a relatively strong market for premises.
- The town has the 5th lowest crime rate in Buckinghamshire and a good perception of security and safety.
- Amersham on the Hill has higher levels of visitor satisfaction with bus and train services and the layout of the centre than the Buckinghamshire average.

Weaknesses

- The centre has a small, localised catchment area, which falls within the sub-regional catchment areas of High Wycombe and Watford.
- Food stores are relatively small and not ideal for bulk food and grocery shopping. The Little Waitrose, Marks & Spencer and Tesco Express are primarily top-up and basket shopping facilities.
- Despite having a reasonable number of comparison shops, the choice in some sectors is limited and the number of higher order comparison shops such as fashion and clothing is small, particularly in comparison with larger centres in the sub-region i.e. Watford, High Wycombe and Hemel Hempstead.
- Amersham on the Hill is rated as slightly below average in terms of environment and ambience when compared with other centres in Buckinghamshire.

Opportunities

- Better signage to and from Amersham Old Town, the Railway Station and leisure centre could help to increase linked trips between and increase trade from commuters/visitors. .
- The 1960's buildings at Sycamore Corner provide a potential development opportunity that would improve the appearance of this part of the town centre.
- The new leisure centre should attract more visitors providing opportunities for linked purpose trips.
- There is an opportunity to build-on and further strengthen the evening/night-time economy, particularly pubs/bars.

Threats

- Based on the current mix of uses, the continued national decline of comparison goods shop in town centres could lead to a significant increase in vacant shops in the centre.
- The availability of premises for new operators is limited with a low proportion of vacant premises suitable to meet the requirements of modern retailers.
- The absence of activity at the Council offices may reduce lunch time footfall in the centre.
- The Tesco superstore in the Old Town is the primary main and bulk food shopping destination in the Amersham area, which may restrict the potential to improve food shopping provision in Amersham on the Hill.

Future priorities

Table AH10 Amersham on the Hill Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Medium
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Medium
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Medium
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Low
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Low
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	High
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	Medium
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

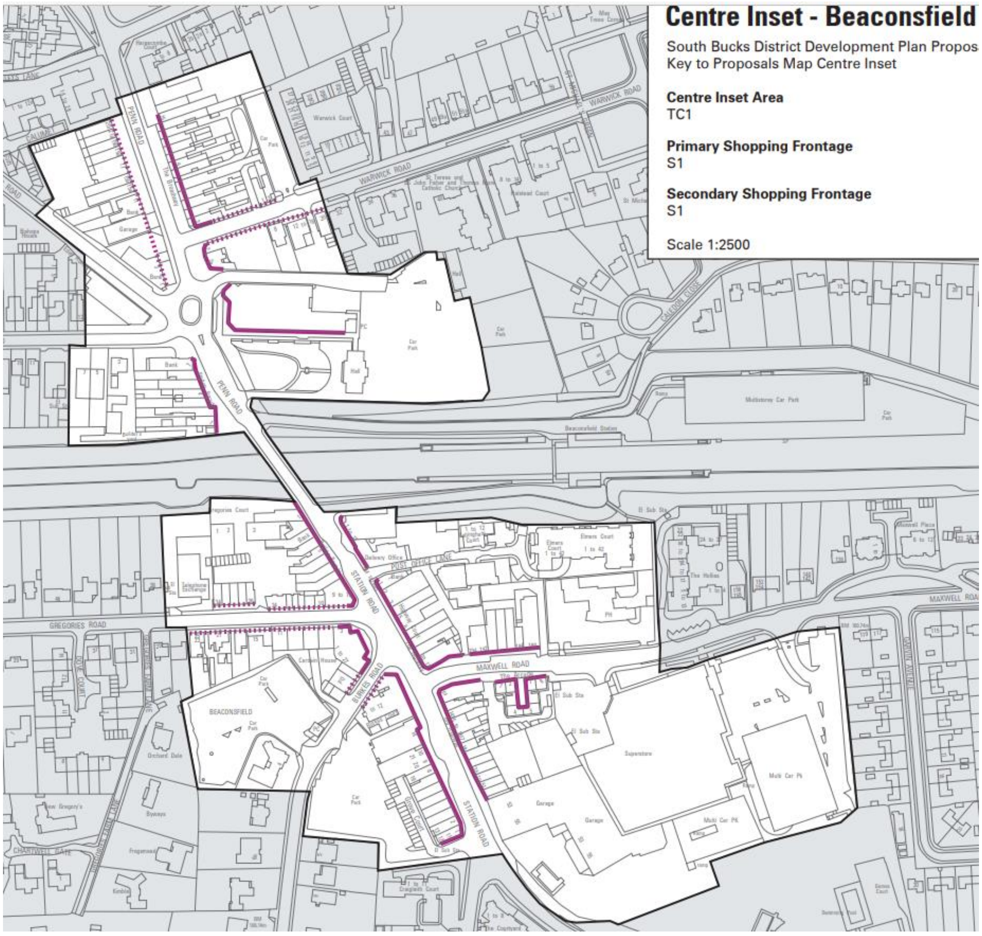
Appendix 11 Beaconsfield New Town health check

Beaconsfield New Town

Introduction

11.1 Beaconsfield New Town is designated as a *'District Centre'* within the South Bucks District Local Plan (adopted 1999 and consolidated September 2007 and February 2011), which places it within the top level of the retail hierarchy of centres for the South Bucks plan area. The designated town centre boundary is relatively tightly drawn around the commercial area, as shown in Figure BN1. Primary and secondary shopping frontages are designated, with most parts of the town centre included as primary frontages. Only peripheral areas on Burkes Road, Gregories Road, Penn Road and Warwick Road are designated as secondary frontages. The centre is linear but split into two main sections by the railway line. The centre is located about a kilometre to the north of Beaconsfield Old Town. These centres largely have different but complementary roles.

Figure 10 Beaconsfield New Town Centre Boundary



Source: South Bucks Local Plan Proposals Map.

Mix of uses

11.2 Beaconsfield New Town has 125 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 29,010 sq.m gross, an average of 232 sq.m gross per unit. Beaconsfield New Town is the fourth largest centre in Buckinghamshire after High Wycombe, Aylesbury and Marlow. The diversity of uses is set out in Table BN1, compared with the average across Buckinghamshire and the Goad Plan national average.

11.3 The centre's mix of units is broadly in line with the national average, but there is a higher proportion of comparison goods retailers than the Buckinghamshire and UK averages. Consistent with the national trend, the proportion of comparison goods shops has decreased from 54.3% in 2016 to 39.2%, based on information within the 2017 Chiltern and South Bucks Retail Study. There are relatively low proportions of food/beverage uses.

Table BN1 - Mix of shops/service units in Beaconsfield New Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	11	8.8	7.4	9.8
Comparison goods retail	49	39.2	31.2	28.8
Financial/professional services	10	8.0	9.4	8.9
Restaurants/Cafés	9	7.2	10.6	10.2
Pubs/Bars	3	2.4	4.4	5.0
Hot food takeaways	5	4.0	5.0	6.3
Other non-retail services	27	21.6	19.5	16.6
Vacant	11	8.8	12.6	14.4
Total	**125**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Beaconsfield New Town (August 2022).

11.4 The proportion of convenience goods outlets is below average, but there is a higher proportion of floorspace due to the presence of the large Sainsbury's and Waitrose store. These stores are supported by a M&S Simply Food, Cook, Majestic Wine, McColl's and a small number of specialist bakers and health foods.

Table BN2 - Mix of shops/service floorspace in Beaconsfield New Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	9,590	33.1	17.7
Comparison goods retail	10,810	37.3	33.9
Financial/professional services	1,430	4.9	7.3
Restaurants/Cafés	1,370	4.7	7.2
Pubs/Bars	1,630	5.6	6.5
Hot food takeaways	410	1.4	3.4
Other non-retail services	1,980	6.8	8.6
Vacant	1,790	6.2	15.4
Total	**29,010**	**100.0**	**100.0**

Source: Experian Goad for Beaconsfield New Town (August 2022).

11.5 Vacancies (11 units equating to 8.8%) are lower than the Buckinghamshire and UK averages. However, there were no vacant units recorded in 2016, which suggest vacancies have increased significantly in recent years. The are no obvious concentrations of vacant units and most vacant units are small (under 150 sq.m). However, there are several relatively large vacant former banks. More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests 8 vacant units.

Retailer representation

11.6 Beaconsfield New Town has a reasonable selection of comparison shops (49) for a centre of its size, with all Goad categories represented in the centre, but the choice of outlets in most categories is limited, except for clothing/footwear, chemists/opticians and charity shops.

Table BN3 - Mix of comparison goods stores in Beaconsfield New Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	14	28.6	18.1	21.1	24.2
Furniture, carpets and textiles	4	8.2	4.1	7.6	7.9
Books, arts, cards and stationers	2	4.1	3.1	6.2	4.1
Electrical, music and photography	1	2.0	1.2	9.4	5.0
DIY, hardware and homeware	1	2.0	1.2	7.0	13.0
China, glass and gifts	3	6.1	3.6	5.6	2.6
Cars, motorcycles and accessories	2	4.1	38.9	1.3	2.1
Chemists, drug stores and opticians	7	14.3	13.3	12.0	10.4
Variety, department and catalogue	1	2.0	1.3	1.6	12.2
Florists, nurserymen and seedsmen	1	2.0	0.6	2.3	0.9
Toys, hobby, cycle and sports	2	4.1	2.5	5.4	5.8
Jewellers	2	4.1	2.2	5.1	2.2
Charity and second-hand shops	6	12.2	5.3	9.8	6.6
Other comparison goods retailers	3	6.1	4.5	5.5	3.2
Total	**49**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Beaconsfield New Town (August 2022).

11.7 The centre also features a reasonable provision of national multiple comparison retailers. Nonetheless, many comparison shops in the centre are small independent traders. The multiple comparison retailers (excluding charity shops) include:

Table BN4 - Beaconsfield New Town's comparison multiples

Argos (in Sainsbury's)	Clarks	Sweaty Betty	White Stuff
Boots Chemist	Crew Clothing	Whistles	
Boots Opticians	Lloyds Pharmacy		

11.8 The household survey respondents were asked what they like about Beaconsfield New Town and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BN5.

Table BN5 - Shopping provision - satisfaction v dissatisfaction in Beaconsfield New Town (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	9.3	-1.8	7.4	1.1
Food shops (bakers/butchers/grocers)	1.4	-4.8	-3.4	-2.4
Clothing shops	6.1	-5.0	1.1	-5.1
Quality of shops	4.9	-2.0	2.8	0.2
High street multiples	5.4	-4.0	1.4	-2.2
Independent/specialist shops	12.0	-7.3	4.7	3.7
Affordability of shops	3.3	-7.2	-3.9	-3.3
Supermarkets	14.0	-2.7	11.3	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

11.9 When compared with the Buckinghamshire average, Beaconsfield New Town has higher levels of net dissatisfaction with food shops and affordability. However there are higher level of satisfaction with non-food shops, clothing shops, quality of shops, high street multiples, independent/ specialist shops and supermarkets.

Non-retail services

11.10 Beaconsfield New Town has a reasonable service sector (comprising 54 outlets in total) with all Goad categories represented in the centre. There is a low proportion of restaurants/ cafés, pubs/bars and hot food takeaways. There is a limited number of food/beverage multiples, with only Costa, Starbucks (in Sainsbury's) and Subway present. There is a good provision of estates agents and hairdressers/beauty salons. The number of banks and building societies has reduced in recent years. Other non-retail and community facilities include dentists, council offices, educational institutions, vets, nursery (Childcare4U) and health/fitness clubs. Bekonscot Model Village and railway is a short distance from the town centre.

Table BN6 - Mix of service uses in Beaconsfield New Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK floorspace ave. (%)
Restaurants/cafés	9	18.8	21.5	24.3	24.6
Hot food/takeaways	5	10.4	6.4	15.0	11.4
Pubs/bars	3	6.3	25.6	11.9	22.0
Banks/other financial services	3	6.3	9.0	7.9	11.3
Betting shops/casinos/amusement	1	2.1	1.4	3.7	6.7
Estate agents/valuers	6	12.5	11.8	7.7	6.2
Travel agents	1	2.1	1.1	1.4	1.1
Hairdressers/beauty parlours	18	37.5	20.0	26.5	15.5
Launderettes/dry cleaners	2	4.2	3.1	1.6	1.1
Sub-total	**48**	**100.0**	**100.0**	**100.0**	**100.0**
Other	6				
Total	**54**				

Source: Experian Goad for Beaconsfield New Town (August 2022).

11.11 The household survey results also show conflicting views in relation to non-retail, as shown in Table BN7.

Table BN7 - Non-retail services - satisfaction v dissatisfaction in Beaconsfield New Town (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	16.2	-7.1	9.2	11.0
Pubs / bars	2.2	-0.4	1.8	0.1
Financial services	2.8	-2.7	0.1	-1.4
Other services	1.9	-1.4	0.5	1.0
Leisure facilities	0.7	-2.3	-1.6	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

11.12 When compared with the Buckinghamshire average, Beaconsfield New Town has higher levels of net dissatisfaction with leisure facilities, but higher levels of satisfaction with pubs/bars, financial services and other services.

Catchment area

11.13 The household survey results indicate 22% of respondents across the study area had visited shops, services or leisure facilities at Beaconsfield New Town in the last six months, the fourth highest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was 1.5%, the fifth highest figure. The retail capacity analysis suggests Beaconsfield New Town attracts 1.7% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from three zones in the southeast of the study area.

11.14 The combined base year turnover of Beaconsfield New Town is estimated to be £145 million, the fourth highest turnover in Buckinghamshire. This turnover is split £79 million for convenience retail goods, £36 million for comparison retail goods and £30 million for food/beverage.

11.15 Beaconsfield New Town has a relatively small, localised catchment area, but has a good mixed retail and food/beverage trading base, despite the below average proportion of food/beverage uses. This suggests food/beverage outlets are trading healthily.

Rental levels

11.16 According to the VOA, Beaconsfield New Town has the 4th highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £600 per sq.m, above the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are relatively strong for a centre of its size and may indicate occupier demand is high compared with the supply of available premises. Zone A rents range from £385 to £600 per sq.m in the prime pitch on Station Road.

Accessibility

11.17 Beaconsfield Railway Station is in the middle of the centre about 200-metres walk from the shopping area. Bus stops are located through the centre on Maxwell Road, Penn Road and Station Road. The railway line creates a significant break in shop frontages and divides the centre , restricting movement north to south. The pedestrian route from the railway station to the shopping area and bus stops is poor with narrow pavements.

11.18 Beaconsfield New Town has three public car parks with 320 spaces (10 disabled). Short stay charges are generally £1.70 up to one hour or £3.90 up to three hours. Short stay car parking is relatively expensive when compared with other centres in Buckinghamshire. Car parks are accessible to the main shopping area.

11.19 Of the household survey respondents who had visited Beaconsfield New Town in the last six months, the proximity of the centre to home, work or friends/relatives were important attributes visitors mentioned when compared with other centres in Buckinghamshire. Similar proportions of visitors mentioned proximity to home (22.5% compared with the Buckinghamshire average of 20.7%), work (4.7% compared with 4.1%) and friends/relations (6.7% compared with 5.7%).

11.20 These survey respondents were asked what they like about Beaconsfield New Town and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BN8.

Table BN8 - Levels of accessibility - satisfaction v dissatisfaction in Beaconsfield New Town (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-2.2	-2.2	-2.9
Disabled access	0.4	-0.8	-0.4	-0.1
Bus services	1.2	-1.2	0	-0.8
Train services	0.4	-2.0	-1.6	0.5
Car parking - amount	7.7	-12.0	-4.3	-5.8
Car parking - cost	2.7	-13.5	-10.8	-7.6
Pedestrianised/traffic free areas	0.4	-0.1	0.3	1.2
Centre layout	2.9	0.0	2.9	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

11.21 When compared with the Buckinghamshire average, Beaconsfield New Town appears to have higher levels of net dissatisfaction with disabled access, train services and the cost of car parking. There appears to be some degree of net satisfaction the layout of the centre, albeit below the Buckinghamshire average.

Environment and ambience

11.22 Beaconsfield New Town is centred around Beaconsfield Railway Station, which bisects the centre into distinct northern (Penn Road) and southern (Station Road) areas. The south of the centre benefits from wide pavements and bunting but limited planting or street furniture and is anchored by an M&S Simply Food and a large Sainsbury's food store located on the edge of Beaconsfield New Town, facing towards a dedicated car park. In contrast, the Waitrose to the north of the centre faces public gardens and Beaconsfield Town Hall and is well integrated to the centre. Further north along Penn Road the wide pavement is broken up by on-street parking, which disrupts footfall and detracts from the covered outdoor seating areas supporting the restaurants and cafés.

11.23 Of the household survey respondents who had visited Beaconsfield New Town in the last six months, lower proportions of visitors indicated they like the centre's historic character/heritage (1.4% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (4.0% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BN9.

Table BN9 - Environment and ambience - satisfaction v dissatisfaction in Beaconsfield New Town (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	15.6	-0.8	14.8	16.7
Street cleanliness/maintenance	5.9	-0.6	5.3	3.2
Atmosphere/friendliness	5.0	0.0	5.0	6.0
Undercover shopping	0.7	-1.0	-0.3	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

11.24 When compared with the Buckinghamshire average, Beaconsfield New Town has similar levels of net satisfaction. There was higher levels of dissatisfaction with the lack of covered shopping areas.

Occurrence of crime

11.25 UK Crime Stats indicate there were 943 crimes reported in Beaconsfield (including Old Town) in the year to November 2022, indicating a crime rate of 79.5 crimes per 1,000 people. This is lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Beaconsfield had the 6th highest rate of crime of the s assessed in this study.

11.26 Of the household survey respondents who had visited Beaconsfield New Town in the last six months, 1.1% mentioned more security or better personal safety as a required improvement that would make them visit more often. Although this percentage figure is relatively small it was the 6th highest recorded for the 14 centres in Buckinghamshire.

SWOT analysis

Strengths

- Beaconsfield New Town is the fourth largest centre in Buckinghamshire and has a good mix of comparison and convenience stores.
- There are two large supermarkets (Sainsbury and Waitrose), several multiple comparison retailers and a selection of independent shops. Sainsbury and Waitrose stores are suitable for main and bulk food shopping.
- For a centre of its size, Beaconsfield New Town has a reasonable number and range of comparison shops, although the choice within some categories of shops is limited. There is reasonable mix of multiple chain shops and small independent traders.

- The centres has a relatively good provision of clothing/footwear shops and chemists/ opticians.
- The centre has a relatively low shop vacancy rate, below the Buckinghamshire and UK averages, which suggests operator demand is in line with the supply of premises.
- There is a good provision of estate agents, hairdressers/beauty parlours and medical facilities.
- Beaconsfield New Town has higher levels of satisfaction with non-food shops, clothing shops, quality of shops, high street multiples, independent/ specialist shops and supermarkets than the Buckinghamshire average.
- Retail rental levels are relatively high for a centre of its size and are the 4th highest in Buckinghamshire, which, with the low vacancy rate, suggests a relatively strong market for premises.
- Beaconsfield New Town has higher levels of satisfaction with pubs/bars, financial services and other services than the Buckinghamshire average.
- Beaconsfield New Town has some degree of visitor satisfaction with the layout of the centre, albeit below the Buckinghamshire average.

Weaknesses

- The centre has a small, localised catchment area, which falls within the sub-regional catchment areas of High Wycombe and Slough.
- Beaconsfield New Town has a relative under-provision of food and beverage outlets including restaurants, pubs and bars. There is a poor range of leisure and entertainment facilities.
- The centre is linear and dissected by the railway line creating a 60 metre dead frontage, which does not encourage shoppers to visit all parts of the centre during their visit.
- Pedestrian access from the railway station to the shopping area is poor with narrow pavements.
- There is a limited supply of premises available to accommodate new operators looking to trade in Beaconsfield.
- Beaconsfield New Town has higher levels of net dissatisfaction with food shops and affordability when compared with the Buckinghamshire average.
- Beaconsfield New Town has higher levels of net dissatisfaction with leisure facilities than the Buckinghamshire average.
- Beaconsfield New Town has higher levels of visitor dissatisfaction with disabled access, train services and the cost of car parking than the Buckinghamshire average.

Opportunities

- Bekonscot Model Village & Railway and the National Film and Television School are a short distance from the town centre. Improved signage to and from the town centre could generate more linked purpose trips.

- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- There is an opportunity to improve the centre's evening/night-time economy, particularly restaurants and pubs/bars.

Threats

- Based on the current mix of uses, the continued national decline of comparison goods shop in town centres could lead to a significant increase in vacant shops in the centre.
- The availability of premises for new operators is limited with a low proportion of vacant premises suitable to meet the requirements of modern retailers.

Future priorities

Table BN10 Beaconsfield New Town Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Medium
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Medium
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Medium
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Low
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Low
Markets Traditional markets; street trading	Medium
Recreational Space Recreational areas; public space; open space	Medium
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	High
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	Medium
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

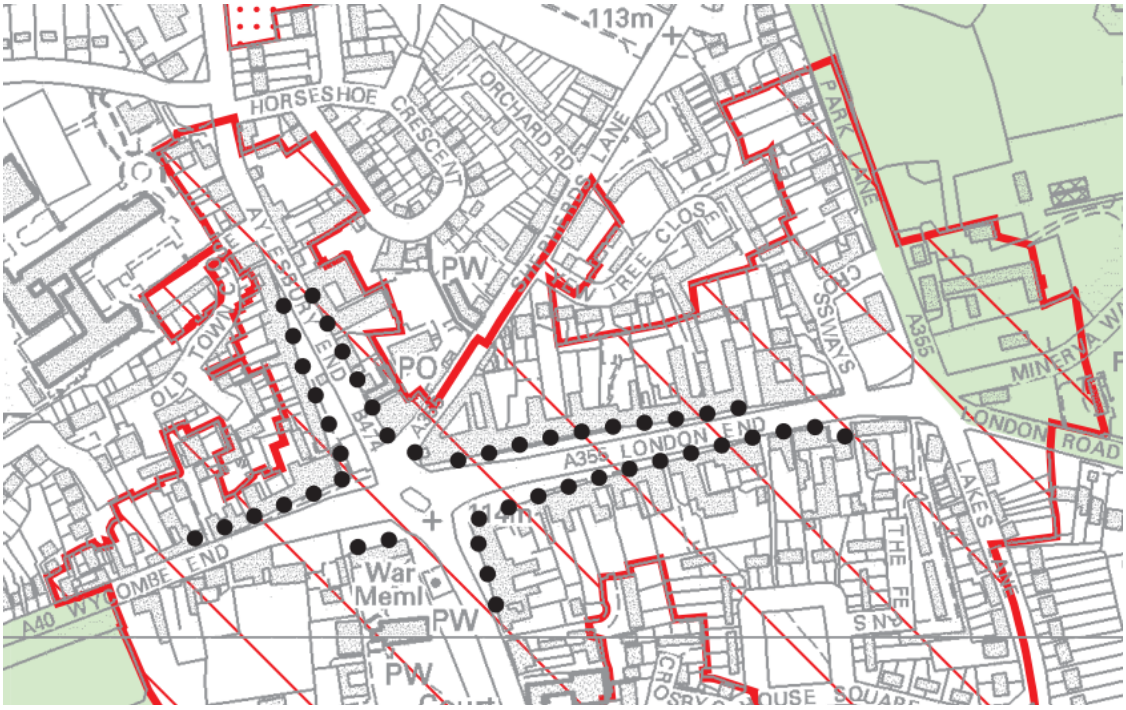
Appendix 12 Beaconsfield Old Town health check

Beaconsfield Old Town

Introduction

12.1 Beaconsfield Old Town is designated as a *'Local Centre'* within the South Bucks District Local Plan (adopted 1999 and consolidated September 2007 and February 2011), which places it within the second level of the retail hierarchy of centres for the South Bucks plan area. The designated shopping frontages are focused on the London End, Wycombe End and Aylesbury End junction and the centre is compact, as shown in Figure BOT1. The centre is within a Conservation Area. The centre is located about a kilometre to the south of Beaconsfield New Town. These centres largely have different but complementary roles.

Figure BOT1 - Beaconsfield Old Town Local Centre Frontages



Source: South Bucks Local Plan Proposals Map.

Mix of uses

12.2 Beaconsfield Old Town Centre has 63 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 8,590 sq.m gross, an average of 136 sq.m gross per unit. Beaconsfield Old Town is the fourth smallest of the 14 main centres in Buckinghamshire, only larger than Wendover, Great Missenden and Winslow. There is a street market on Tuesdays. The diversity of uses within the centre is set out in Table BOT1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table BOT1 - Mix of shops/service units in Beaconsfield Old Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	2	3.2	7.4	9.8
Comparison goods retail	13	20.6	31.2	28.8
Financial/professional services	6	9.5	9.4	8.9
Restaurants/Cafés	10	15.9	10.6	10.2
Pubs/Bars	5	7.9	4.4	5.0
Hot food takeaways	3	4.8	5.0	6.3
Other non-retail services	15	23.8	19.5	16.6
Vacant	9	14.3	12.6	14.4
Total	**63**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Beaconsfield Old Town (August 2022).

12.3 The centre's mix of units is different broadly to the Buckinghamshire and UK averages. There is a low proportion of both convenience and comparison goods retailing. Tesco Express and a newsagent are the convenience goods outlets. The centre has a strong evening economy with a high provision of restaurant and pub/bars. The centre has a relatively high shop vacancy rate compared with the Buckinghamshire average, but still just below the UK average. All the vacant units are small (under 160 sq.m). More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests the number of vacant units was higher at 12 units.

Table BOT2 - Mix of shops/service floorspace in Beaconsfield Old Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	300	3.5	17.7
Comparison goods retail	2,000	23.3	33.9
Financial/professional services	770	9.0	7.3
Restaurants/Cafés	1,190	13.9	7.2
Pubs/Bars	1,720	20.0	6.5
Hot food takeaways	210	2.4	3.4
Other non-retail services	1,560	18.2	8.6
Vacant	840	9.8	15.4
Total	**8,590**	**100.0**	**100.0**

Source: Experian Goad for Beaconsfield Old Town (August 2022).

Retailer representation

12.4 Beaconsfield Old Town has a limited selection of comparison shops (13). Most of the 14 Goad categories are not represented and the choice of outlets in other categories is small. There are only three multiple comparison goods retailers i.e. Farrow & Ball, Fired Earth and John Lewis of Hungerford.

Table BOT3 - Mix of comparison goods stores in Beaconsfield Old Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	3	23.1	18.5	21.1	24.2
Furniture, carpets and textiles	4	30.8	37.0	7.6	7.9
Books, arts, cards and stationers	0	0.0	0.0	6.2	4.1
Electrical, music and photography	1	7.7	13.5	9.4	5.0
DIY, hardware and homeware	3	23.1	22.5	7.0	13.0
China, glass and gifts	0	0.0	0.0	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	0	0.0	0.0	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	0	0.0	0.0	2.3	0.9
Toys, hobby, cycle and sports	0	0.0	0.0	5.4	5.8
Jewellers	0	0.0	0.0	5.1	2.2
Charity and second-hand shops	0	0.0	0.0	9.8	6.6
Other comparison goods retailers	2	15.4	8.5	5.5	3.2
Total	**13**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Beaconsfield Old Town (August 2022).

12.5 The household survey respondents were asked what they like about Beaconsfield Old Town and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BOT4.

Table BOT4 - Shopping provision - satisfaction v dissatisfaction in Beaconsfield Old Town (% of respondents visiting centre

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	3.9	-3.4	0.6	1.1
Food shops (bakers/butchers/grocers)	0.7	-4.6	-4.0	-2.4
Clothing shops	0.6	-5.0	-4.5	-5.1
Quality of shops	2.6	-1.8	0.8	0.2
High street multiples	1.7	-2.2	-0.6	-2.2
Independent/specialist shops	3.0	-2.6	0.4	3.7
Affordability of shops	0.6	-4.9	-4.3	-3.3
Street market	1.8	-1.5	0.4	1.3
Supermarkets	1.8	-2.6	-0.8	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

12.6 When compared with the Buckinghamshire average, Beaconsfield Old Town has higher levels of net dissatisfaction with food shops, affordability and supermarkets. However there are higher level of satisfaction with the quality of shops.

Non-retail services

12.7 For a centre of its size, Beaconsfield Old Town has a reasonable service sector (comprising 39 outlets in total), with only betting shops not represented in the centre. There is a higher proportion of restaurants/cafés and pubs/bars which provide a mix of daytime and night-time facilities, but a lower proportion of hot food/takeaways. The food and beverage outlets are predominantly small independents. There is a good provision of estate agents but an under-provision of financial services. Other non-retail and community facilities include a dentist. The household survey results also show conflicting views in relation to non-retail, as shown in Table BOT6.

Table BOT5 - Mix of service uses in Beaconsfield Old Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK floorspace ave. (%)
Restaurants/cafés	10	29.4	25.1	24.3	24.6
Hot food/takeaways	3	8.8	4.4	15.0	11.4
Pubs/bars	5	14.7	36.2	11.9	22.0
Banks/other financial services	1	2.9	7.8	7.9	11.3
Betting shops/casinos/amusement	0	0.0	0.0	3.7	6.7
Estate agents/valuers	4	11.8	6.5	7.7	6.2
Travel agents	1	2.9	2.5	1.4	1.1
Hairdressers/beauty parlours	9	26.5	15.8	26.5	15.5
Launderettes/dry cleaners	1	2.9	1.7	1.6	1.1
Sub-total	**34**	**100.0**	**100.0**	**100.0**	**100.0**
Other	5				
Total	**39**				

Source: Experian Goad for Beaconsfield Old Town (August 2022).

Table BOT6 Non-retail services - satisfaction v dissatisfaction in Beaconsfield Old Town (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	35.3	-3.4	31.9	11.0
Pubs / bars	9.9	-0.6	9.3	0.1
Financial services	1.5	-0.7	0.9	-1.4
Other services	0.2	-3.4	-3.2	1.0
Leisure facilities	1.0	-1.5	-0.5	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

12.8 When compared with the Buckinghamshire average, Beaconsfield Old Town has higher levels of net dissatisfaction with other services and leisure facilities, but higher levels of satisfaction with cafés/restaurants, pubs/bars and financial services.

Catchment area

12.9 The household survey results indicate 15% of respondents across the study area had visited shops, services or leisure facilities at Beaconsfield Old Town in the last six months, the 7th highest percentage for the 14 assessed main centres in Buckinghamshire, but no respondents do most of their non-food shopping in Beaconsfield Old Town. The retail capacity analysis suggests Beaconsfield Old Town attracts less than 0.1% of comparison goods expenditure within the study area, with most trade coming from the local zone.

12.10 The combined base year turnover of Beaconsfield Old Town is estimated to be £51 million, the fourth lowest turnover in Buckinghamshire. This turnover is split £7 million for convenience retail goods, £2 million for comparison retail goods and £42 million for food/beverage.

12.11 Beaconsfield Old Town has a localised catchment area and its attraction relates primary to food/beverage outlets rather than retail.

Rental levels

12.12 According to the VOA, Beaconsfield Old Town has the 2nd highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £850 per sq.m, much higher than the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are very strong for a centre of its size. Zone A rents range from £165 to £850 per sq.m in the prime pitch on London Road.

Accessibility

12.13 Beaconsfield Railway Station is over a kilometre to the north of Beaconsfield on Old Town. The centre is served by bus stops on Aylesbury End and London Road. Beaconsfield Old Town has no public car parks, although on street parking is available.

12.14 Of the household survey respondents who had visited Beaconsfield Old Town in the last six months, the proximity of the centre to home and work were less important attributes visitors mentioned when compared with other centres in Buckinghamshire. Lower proportions of visitors mentioned proximity to home (4.9% compared with the Buckinghamshire average of 20.7%) and work (3.3% compared with 4.1%), but a higher proportion mentioned friends/relations (6.4% compared with 5.7%).

12.15 These survey respondents were asked what they like about Beaconsfield Old Town and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BOT7.

12.16 When compared with the Buckinghamshire average, Beaconsfield Old Town appears to have higher levels of net dissatisfaction with car accessibility/traffic congestion, bus services and the amount of car parking. There are lower levels of net dissatisfaction with the cost of car parking because most car parking is free in the centre.

Table BOT7 - Levels of accessibility - satisfaction v dissatisfaction in Beaconsfield Old Town (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-4.8	-4.8	-2.9
Disabled access	0.8	0.0	0.8	-0.1
Bus services	0	-1.2	-1.2	-0.8
Train services	1.5	-1.5	0.0	0.5
Car parking - amount	6.3	-27.8	-21.5	-5.8

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car parking - cost	4.2	-5.9	-1.7	-7.6
Pedestrianised/traffic free areas	0.6	-0.4	0.2	1.2
Centre layout	3.5	0.0	3.5	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Environment and ambience

12.17 Beaconsfield Old Town is centred around a four-way junction and dominated by car parking, both on and off street, with most parking spaces concentrated to the south of the centre along Windsor End. Nonetheless, wide pavements and units setback from the road with clear crossing points support the walkability of the core of the centre along London Road, which also features bunting and trees that break up the view along the street creating a boulevard. Wycombe End, Windsor End and Aylesbury End are less busy than London End, comprising a greater proportion of secondary uses broken up by residential dwellings in addition to planters and other street furniture.

12.18 Of the household survey respondents who had visited Beaconsfield Old Town in the last six months, higher proportions of visitors indicated they like the centre's historic character/heritage (5.8% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (13.1% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were mixed views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BOT8.

Table BOT8 - Environment and ambience - satisfaction v dissatisfaction in Beaconsfield Old Town (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	31.6	-0.6	31.0	16.7
Street cleanliness/maintenance	4.6	-1.3	3.3	3.2
Atmosphere/friendliness	5.2	0.0	5.2	6.0
Undercover shopping	0.0	-0.8	-0.8	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

12.19 When compared with the Buckinghamshire average, Beaconsfield Old Town has higher levels of net satisfaction with the environment. There was higher levels of dissatisfaction with the lack of covered shopping areas.

Occurrence of crime

12.20 UK Crime Stats indicate there were 943 crimes reported in Beaconsfield (including New Town) in the year to November 2022, indicating a crime rate of 79.5 crimes per 1,000 people. This is lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Beaconsfield had the 6th highest rate of crime of the 14 towns assessed in this study.

12.21 Of the household survey respondents who had visited Beaconsfield Old Town in the last six months, only 0.2% mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Beaconsfield Old Town provides a niche market with high quality interior design shops. It complements the role of Beaconsfield New Town, providing specialist independent shops, as well a good selection of restaurants, pus and bars.
- Beaconsfield Old Town is an attractive village. The Conservation Area has many period buildings dating from the 17th and 18th Centuries. It has a pleasant environment, with attractive areas of public seating and a good provision of street furniture.
- Retail rental levels are high for a centre of its size and are the 2nd highest in Buckinghamshire, which suggests a relatively strong commercial property market, despite the relatively high vacancy rate.
- Beaconsfield Old Town has higher levels of satisfaction with the quality of shops than the Buckinghamshire average.
- The centre has higher levels of satisfaction with cafés/restaurants, pubs/bars and financial services than the Buckinghamshire average.
- Beaconsfield Old Town is rated as above average in terms of environment and ambience when compared with other centres in Buckinghamshire.

Weaknesses

- Beaconsfield Old Town is situated at the junction of the A40 and the B474, and there is a high volume of traffic flowing through the centre.
- Car parking provision is mainly on street, and there were a limited number of spaces available at peak times.
- The fourth smallest centre in Buckinghamshire with a limited number of shops. The range and choice of comparison goods shops is limited.
- There is no large food store suitable for main and bulk food and grocery shopping.
- The centre has a small, localised catchment area, which falls within the sub-regional catchment areas of High Wycombe, Watford and Uxbridge.
- The shop vacancy rate is above the Buckinghamshire average.
- Beaconsfield Old Town has no banks or building societies.
- Shop units are primarily period buildings that are narrow and limited in size.
- Beaconsfield Old Town has higher levels of net dissatisfaction with food shops, affordability and supermarkets when compared with the Buckinghamshire average.
- The centre has higher levels of net dissatisfaction with other services and leisure facilities than the Buckinghamshire average.

- Beaconsfield Old Town has higher levels of visitor dissatisfaction with car accessibility/ traffic congestion, bus services and the amount of car parking.

Opportunities

- The centre is an attractive place to visit and there is potential to build on this niche role.
- Improved signage and linkages with Beaconsfield New Town and the National Film and Television School could increase the number of linked purpose trips.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- The relatively large number of vacant premises provide opportunities for further investment, including non-retail services and leisure uses.
- There is an opportunity to build-on and further strengthen the evening/night-time economy and its niche shopping role.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.
- Continued high traffic flows may undermine the ambience of the centre for visitors.
- The historic character of the town centre, particularly in terms of the conservation area designation and listed buildings, could restrict future development proposals.

Future priorities

Table BOT9 Beaconsfield Old Town Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	High
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Low
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	High
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	High
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	High
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Medium
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	High
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	High
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Medium
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Medium
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

Appendix 13 Buckingham health check

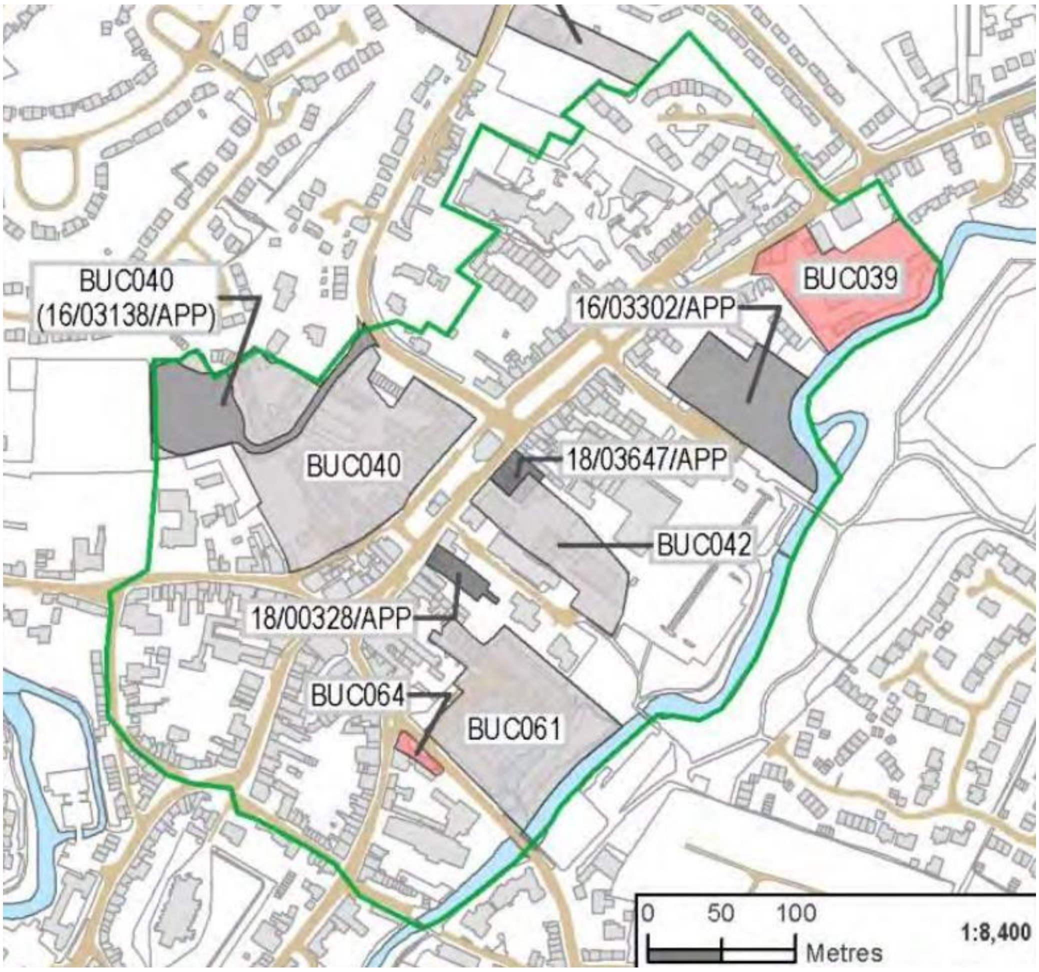
Buckingham

Introduction

13.1 Buckingham Town Centre is designated as a *'Town Centre'* within the Vale of Aylesbury Adopted Local Plan (September 2021). It is described as a small market town located in the north of Buckinghamshire. The historic core is a designated conservation area. The town is the home to the University of Buckingham.

13.2 The Adopted Local Plan and Neighbourhood Plan identify a relatively wide town centre boundary, as shown in Figure BU1. Within this boundary the Neighbourhood Plan designates Primary and Second Retail Frontages. The primary frontages cover most of the shopping areas and include Bridge Street, High Street, Market Hill, Market Square, Meadow Shopping Centre and West Street. Only peripheral areas are designated as secondary frontages i.e. Castle Street, High Street east of Cornwall Road and Well Street. The shopping area is relatively compact providing natural circuits for pedestrians.

Figure BU1 - Buckingham Town Centre Boundary



Source: Vale of Aylesbury Adopted Local Plan (September 2021) Proposals Map.

Mix of uses

13.3 Buckingham Town Centre has 136 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 14,770 sq.m gross, an average of 108 sq.m gross per unit. Buckingham is the ninth largest centre in Buckinghamshire. There is a general market on Tuesdays and Saturdays with 12 stalls and a Saturday flea market. The diversity of uses within the centre is set out in Table BU1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table BU1 - Mix of shops/service units in Buckingham Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	9	6.6	7.4	9.8
Comparison goods retail	41	30.1	31.2	28.8
Financial/professional services	9	6.6	9.4	8.9
Restaurants/Cafés	17	12.5	10.6	10.2
Pubs/Bars	6	4.4	4.4	5.0
Hot food takeaways	7	5.1	5.0	6.3
Other non-retail services	33	24.3	19.5	16.6
Vacant	14	10.3	12.6	14.4
Total	**136**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Buckingham (November 2022).

13.4 The centre's mix of units is broadly in line with the Buckinghamshire and UK averages. There is a low provision of financial/professional services but a high provision of other non-retail services. Food/beverage uses are around average. The proportion of convenience good outlets is slightly below average, but the Waitrose food store is suitable for main food shopping. This store is supported by a small Tesco Express and a small selection of specialists e.g. butchers, off license and health food shop.

Table BU2 - Mix of shops/service floorspace in Buckingham Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	2,350	15.9	17.7
Comparison goods retail	4,160	28.2	33.9
Financial/professional services	1,070	7.2	7.3
Restaurants/Cafés	1,910	12.9	7.2
Pubs/Bars	780	5.3	6.5
Hot food takeaways	600	4.1	3.4
Other non-retail services	2,420	16.4	8.6
Vacant	1,480	10.0	15.4
Total	**14,770**	**100.0**	**100.0**

Source: Experian Goad for Buckingham (November 2022).

13.5 There were 14 vacant shop units and the vacancy rate is below the Buckinghamshire and UK averages. Most of the vacant units are small (under 150 sq.m). There are concentrations of vacant units in the western periphery of the centre in Castle Street, Well Street, West

Street and Market Square. More recent (quarter 1- 2023) information collected by the Council's Economic Growth and Regeneration department suggests 10 vacant units.

Retailer representation

13.6 Buckingham has a reasonable selection of comparison shops (41) for a centre of its size, with only two Goad categories not represented. There is a good provision of chemists/opticians (e.g. Boots, Specsavers and Vision Express) and charity shops. There is a relatively limited selection of clothing/footwear outlets.

13.7 The centre has a relatively limited provision of national multiple comparison retailers (excluding charity shops). Most comparison shops in the centre are small independent traders. The multiple comparison retailers include Boots and WH Smith.

13.8 The household survey respondents were asked what they like about Buckingham town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BU4.

Table BU3 - Mix of comparison goods stores in Buckingham Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	5	12.2	17.1	21.1	24.2
Furniture, carpets and textiles	4	9.8	9.6	7.6	7.9
Books, arts, cards and stationers	3	7.3	9.9	6.2	4.1
Electrical, music and photography	2	4.9	2.9	9.4	5.0
DIY, hardware and homeware	5	12.2	9.1	7.0	13.0
China, glass and gifts	4	9.8	6.5	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	7	17.1	21.6	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	1	2.4	1.0	2.3	0.9
Toys, hobby, cycle and sports	0	0.0	0.0	5.4	5.8
Jewellers	1	2.4	1.2	5.1	2.2
Charity and second-hand shops	6	14.6	16.6	9.8	6.6
Other comparison goods retailers	3	7.3	4.6	5.5	3.2
Total	**41**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Buckingham (November 2022).

Table BU4 - Shopping provision - satisfaction v dissatisfaction in Buckingham (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	0.7	-5.5	-4.8	1.1
Food shops (bakers/butchers/grocers)	0.8	-5.7	-4.9	-2.4
Clothing shops	0.7	-15.4	-14.7	-5.1
Quality of shops	4.1	-2.2	2.0	0.2
High street multiples	0.6	-12.7	-12.2	-2.2
Independent/specialist shops	11.2	-5.5	5.7	3.7
Affordability of shops	1.9	-8.9	-7.0	-3.3
Street market	4.4	-1.8	2.7	1.3
Supermarkets	2.8	-6.6	-3.9	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

13.9 When compared with the Buckinghamshire average, Buckingham has higher levels of net dissatisfaction with non-food shops, food shops, clothing shops, high street multiples, affordability and supermarkets. However there are higher level of satisfaction with the quality of shops, independent/specialist shops and the street market.

Non-retail services

13.10 Buckingham has a relatively strong service sector (comprising 72 outlets in total) with only travel agents not represented in the centre. The food/beverage sector is comparable with the UK average, with a slightly higher provision of restaurants/cafés. Food/beverage multiples include Costa and Domino's Pizza. There is a particularly high provision of hairdressers/beauty parlours. Other non-retail and community facilities include community centres, library, GP surgeries, vet, health/fitness club and a museum. The household survey results also show conflicting views in relation to non-retail, as shown in Table BU6. There are no banks and only an accountant in the financial services category.

Table BU5 - Mix of service uses in Buckingham Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	17	28.8	34.7	24.3	24.6
Hot food/takeaways	7	11.9	10.9	15.0	11.4
Pubs/bars	6	10.2	14.2	11.9	22.0
Banks/other financial services	1	1.7	0.5	7.9	11.3
Betting shops/casinos/amusement	1	1.7	3.1	3.7	6.7
Estate agents/valuers	6	10.2	11.3	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	19	32.2	22.7	26.5	15.5
Launderettes/dry cleaners	2	3.4	2.5	1.6	1.1
Sub-total	**59**	**100.0**	**100.0**	**100.0**	**100.0**
Other	13				
Total	**72**				

Source: Experian Goad for Buckingham (November 2022).

Table BU6 - Non-retail services - satisfaction v dissatisfaction in Buckingham (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	13.0	-5.0	8.0	11.0
Pubs / bars	1.5	-6.9	-5.4	0.1
Financial services	1.2	-4.6	-3.4	-1.4
Other services	5.8	-1.8	4.0	1.0
Leisure facilities	1.5	-2.9	-1.4	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

13.11 When compared with the Buckinghamshire average, Buckingham has higher levels of net dissatisfaction with pubs/bars, financial services and leisure facilities, but higher levels of satisfaction with cafés/restaurants and other services.

Catchment area

13.12 The household survey results indicate 11% of respondents across the study area had visited shops, services or leisure facilities at Buckingham town centre in the last six months, the third lowest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was only 0.3%. The retail capacity analysis suggests Buckingham attracts 1.2% of comparison goods expenditure within the study area, with a reasonable level of trade drawn only from the local zones in the north of the study area.

13.13 The combined base year turnover of Buckingham is estimated to be £121 million, the sixth highest turnover in Buckinghamshire. This turnover is split £69 million for convenience retail goods, £25 million for comparison retail goods and £27 million for food/beverage.

13.14 Buckingham has a relatively small, localised catchment area, but has a good mixed retail and food/beverage trading base.

Rental levels

13.15 According to the VOA, Buckingham has the 6th lowest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £375 per sq.m, below the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are consistent with Buckingham's position in the retail hierarchy and indicate occupier demand is below average. Zone A rents range from £220 to £375 per sq.m in the prime pitch on Market Square and Market Hill.

Accessibility

13.16 Buckingham has no railway services. The bus terminus is located at the east end of the High Street and bus stops are also on Moreton Road. Buckingham town centre has two public car parks with 366 spaces (14 disabled). The Western Avenue car park (42 spaces) is free and the Cornwall Meadow is pay and display with up to 3 hours for £0.60. Both car parks are accessible close to the main shopping area.

13.17 Of the household survey respondents who had visited Buckingham in the last six months, the proximity of the centre to home was a less important attribute visitors mentioned when compared with other centres in Buckinghamshire. Lower proportions of visitors mentioned proximity to home (18.7% compared with the Buckinghamshire average of 20.7%), but similar to average proportions mentioned work (6.7% compared with 4.1%) and friends/relations (6.2% compared with 5.7%).

13.18 These survey respondents were asked what they like about Buckingham town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BU7.

Table BU7 - Levels of accessibility - satisfaction v dissatisfaction in Buckingham (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-6.2	-6.2	-2.9
Disabled access	2.8	-0.8	2.0	-0.1
Bus services	4.5	-3.5	1.0	-0.8
Train services	2.5	-2.4	0.1	0.5
Car parking - amount	7.7	-10.4	-2.7	-5.8
Car parking - cost	3.9	-13.5	-9.5	-7.6
Pedestrianised/traffic free areas	3.9	-1.7	2.2	1.2
Centre layout	9.5	0	9.5	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

13.19 When compared with the Buckinghamshire average, Buckingham town centre has higher levels of net dissatisfaction with car accessibility/traffic congestion and the cost of car parking. There appear to be higher levels of net satisfaction with disabled access, bus services and the layout of the centre.

Environment and ambience

13.20 Buckingham is an attractive historic market town with a mix of period and modern buildings. The ambience of the centre suffers from relatively high levels of through traffic and narrow pavements in West Street and Bridge Street. The concentrations of vacant units in the western periphery of the centre have a negative impact on the townscape. Meadow Walk and Cornwall Place provide a partially covered and traffic free shopping environment.

13.21 Of the household survey respondents who had visited Buckingham in the last six months, higher proportions of visitors indicated they like the centre's historic character/heritage (9% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (10.2% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table BU8.

13.22 When compared with the Buckinghamshire average, Buckingham has higher levels of net satisfaction with street/cleanliness and the atmosphere/friendliness. There were higher levels of dissatisfaction with the lack of covered shopping areas.

Table BU8 - Environment and ambience - satisfaction v dissatisfaction in Buckingham (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	17.4	-2.1	15.3	16.7
Street cleanliness/maintenance	7.0	-2.7	4.3	3.2
Atmosphere/friendliness	8.9	0.0	8.9	6.0
Undercover shopping	1.4	-2.9	-1.5	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Occurrence of crime

13.23 UK Crime Stats indicate there were 977 crimes reported in Buckingham in the year to November 2022, indicating a crime rate of 82.1 crimes per 1,000 people. This is slightly lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. However, Buckingham had the 4th highest rate of crime of the 14 towns assessed in this study. Of the household survey respondents who had visited Buckingham in the last six months, only 0.7% mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Buckingham is an attractive market town and the historic core is a designated conservation area.
- The centre is compact with natural circuits for pedestrians.
- The Waitrose food store is suitable for main and bulk food shopping and is complemented by a selection of small independent convenience shops.
- The centre has a reasonable range of small independent shops.
- The centre has a relatively good choice of chemists/opticians. hairdressers/beauty parlours, community and medical facilities.
- The Old Gaol Museum and hotels help to attract additional visitors to the centre.
- The centre has a relatively low shop vacancy rate, below the Buckinghamshire and UK averages, which suggests operator demand is broadly in line with the supply of premises.
- Buckingham has higher levels of satisfaction with the quality of shops, independent/ specialist shops and the street market than the Buckinghamshire average.
- Buckingham has higher levels of satisfaction with cafés/restaurants and other services.

- Buckingham town centre has higher levels of visitor satisfaction with disabled access, bus services and the layout of the centre than the Buckinghamshire average.
- Buckingham is rated as above average in terms of environment and ambience when compared with other centres in Buckinghamshire.

Weaknesses

- Buckingham has a small, localised catchment area, which falls within the sub-regional catchment area of Milton Keynes.
- The centre has a limited choice of national multiple retailers and clothing/footwear outlets.
- The shop unit sizes are primarily narrow and limited in size due to the historic nature of the centre. This limits the possibility for larger format stores.
- Concentrations of vacant units in the western periphery of the centre have a negative impact on the townscape.
- Buckingham has higher levels of net dissatisfaction with non-food shops, food shops, clothing shops, high street multiples, affordability and supermarkets than the Buckinghamshire average.
- Buckingham has higher levels of net dissatisfaction with pubs/bars, financial services and leisure facilities.
- The ambience of the centre suffers from relatively high levels of through traffic and narrow pavements.
- Buckingham town centre has higher levels of visitor dissatisfaction with car accessibility/ traffic congestion and the cost of car parking than the Buckinghamshire average.

Opportunities

- Environmental improvements and traffic calming could improve activity in open spaces.
- The University of Buckingham is within walking distance of the town centre. Improved signage to and from the centre could increase link purpose trips.
- The centre is about 4 kilometres from the National Trust tourist attraction at Stowe. Encouraging tourists to visit the town centre during their trip could improve footfall.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- As a visitor destination, there is an opportunity to build-on and further strengthen the evening/night-time economy.
- Increased 'staycation' demand could increase the number of visitors to the town, providing spin off benefits to shop and services in the town centre.

Threats

- The historic character and conservation area could restrict future development proposals.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.

Future priorities

Table BU9 Buckingham Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Medium
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Medium
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Medium
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Medium
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Medium
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

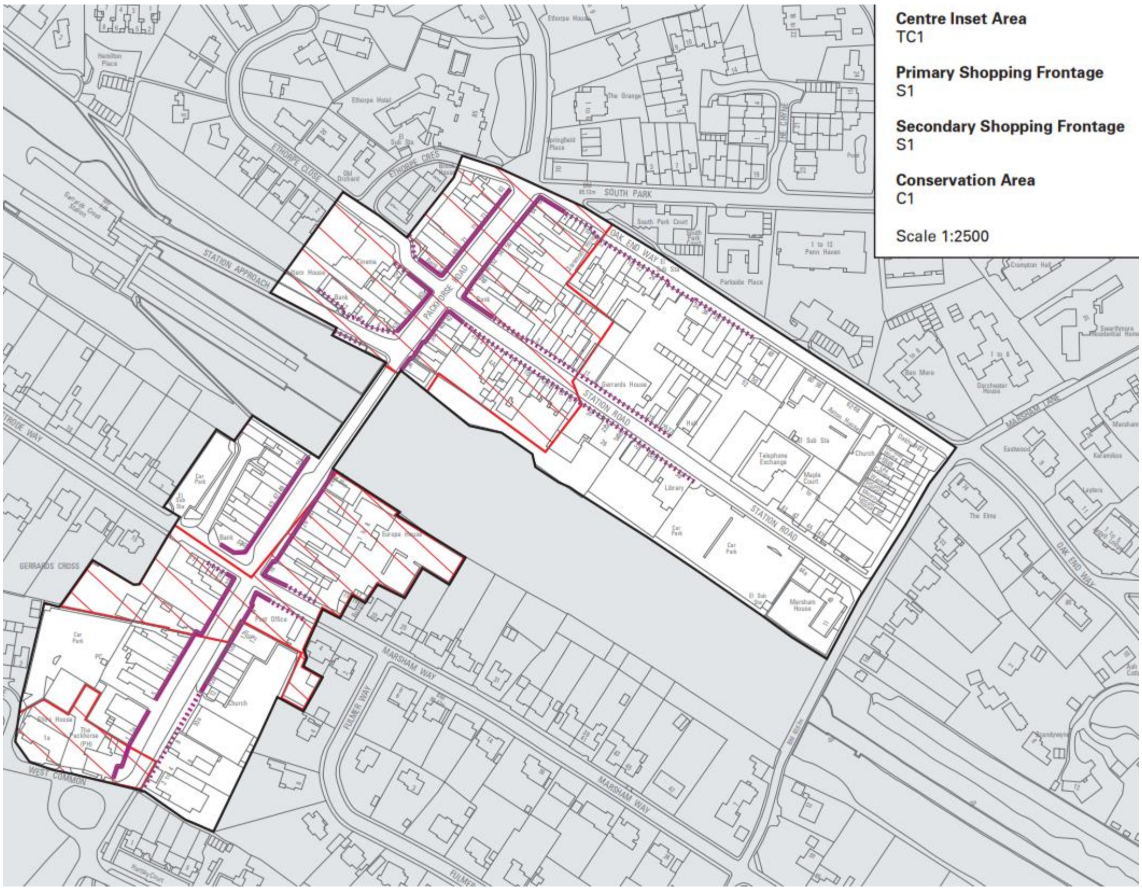
Appendix 14 Gerrards Cross health check

Gerrards Cross

Introduction

14.1 Gerrards Cross is designated as a *'District Centre'* within the South Bucks District Local Plan (adopted 1999 and consolidated September 2007 and February 2011), which places it within the top level of the retail hierarchy of centres for the South Bucks plan area. The designated town centre boundary is relatively tightly drawn around the commercial area, as shown in Figure GC. The centre boundary excludes the Tesco store. Primary and secondary shopping frontages are designated, with most parts of the town centre included as primary frontages. Only peripheral areas on Bulstrode Way, Masham Way, Oak End Way, Station Approach and Station Road, are designated as secondary frontages. The centre is linear in structure and is split into two main sections by the railway line.

Figure GC - Gerrards Cross Town Centre Boundary



Source: South Bucks Local Plan Proposals Map.

Mix of uses

14.2 Gerrards Cross Town Centre has 124 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 21,820 sq.m gross, an average of 176 sq.m gross per unit. Gerrards Cross is the seventh largest centre in Buckinghamshire. There is a monthly artisans market.

The diversity of uses within the centre is set out in Table GC1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table GC1 - Mix of shops/service units in Gerrards Cross Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	8	6.5	7.4	9.8
Comparison goods retail	34	27.4	31.2	28.8
Financial/professional services	8	6.5	9.4	8.9
Restaurants/Cafés	13	10.5	10.6	10.2
Pubs/Bars	3	2.4	4.4	5.0
Hot food takeaways	5	4.0	5.0	6.3
Other non-retail services	32	25.8	19.5	16.6
Vacant	21	16.9	12.6	14.4
Total	**124**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Gerrards Cross (May 2022).

14.3 The centre's mix of units is broadly in line with the national average, although it has a higher proportion of other non-retail services and lower proportions of comparison and convenience goods retail units than the Buckinghamshire and UK averages. However, the proportion of convenience goods floorspace is above average due to the large Tesco and Waitrose stores. These stores are supported by Majestic Wine, Cook, Holland & Barrett, two butchers and baker. The proportion of comparison goods retailers (27.4%) has fallen from 38.0% recorded in 2016, based on information within the 2017 Chiltern and South Bucks Retail Study, but this is a general trend seen across most centres in the UK, and Marlow remains consistently above the UK average.

14.4 Pubs/bars and hot food takeaways are also below average. Gerrards Cross has a relatively high shop vacancy rate (21 units, equating to 16.9%). Four of the vacant units in May 2022 were recorded as under alteration and the vacancy rate may have fallen. More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests 14 vacant units.

Table GC2 - Mix of shops/service floorspace in Gerrards Cross Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	6,380	29.2	17.7
Comparison goods retail	4,610	21.1	33.9
Financial/professional services	1,200	5.5	7.3
Restaurants/Cafés	2,470	11.3	7.2
Pubs/Bars	520	2.4	6.5
Hot food takeaways	280	1.3	3.4
Other non-retail services	2,870	13.2	8.6
Vacant	3,490	16.0	15.4
Total	**21,820**	**100.0**	**100.0**

Source: Experian Goad for Gerrards Cross (May 2022).

Retailer representation

14.5 Gerrards Cross has a reasonable selection of comparison shops (34) for a centre of its size, but four of the Goad categories are not represented in the centre and the choice of outlets in most categories is limited. Overall, Gerrards Cross has a reasonable range of shops with most categories represented but there is a relatively poor choice of shops within each category.

Table GC3 - Mix of comparison goods stores in Gerrards Cross Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	5	14.7	10.6	21.1	24.2
Furniture, carpets and textiles	5	14.7	16.9	7.6	7.9
Books, arts, cards and stationers	4	11.8	9.5	6.2	4.1
Electrical, music and photography	3	8.8	4.6	9.4	5.0
DIY, hardware and homeware	4	11.8	23.4	7.0	13.0
China, glass and gifts	0	0.0	0.0	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	5	14.7	16.1	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	0	0.0	0.0	2.3	0.9
Toys, hobby, cycle and sports	1	2.9	4.6	5.4	5.8
Jewellers	1	2.9	2.2	5.1	2.2
Charity and second-hand shops	4	11.8	10.0	9.8	6.6
Other comparison goods retailers	2	5.9	2.2	5.5	3.2
Total	**34**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Gerrards Cross (May 2022).

14.6 Gerrards Cross has a limited number of national multiple comparison retailers. The main operators (excluding charity shops) are Boots, Card Factory, Carpetright, Specsavers and WH Smiths. Most comparison shops in the centre are small independent traders.

14.7 The household survey respondents were asked what they like about Gerrards Cross and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table GC4.

Table GC4 - Shopping provision - satisfaction v dissatisfaction in Gerrards Cross (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	4.9	-3.2	1.7	1.1
Food shops (bakers/butchers/grocers)	0.0	-2.5	-2.5	-2.4
Clothing shops	4.8	-7.4	-2.6	-5.1
Quality of shops	3.7	-3.4	0.3	0.2
High street multiples	2.4	-3.8	-1.4	-2.2
Independent/specialist shops	2.2	-4.8	-2.6	3.7
Affordability of shops	1.2	-4.8	-3.7	-3.3
Street market	0.7	-3.7	-3.0	1.3
Supermarkets	9.1	-1.6	7.5	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

14.8 When compared with the Buckinghamshire average, Gerrards Cross has higher levels of net dissatisfaction with the affordability of shops, independent/specialist shops and the street market. However there are higher level of satisfaction with non-food shops and supermarkets.

Non-retail services

14.9 The town centre has a reasonable service sector (comprising 61 units in total) with all Goad categories represented in the centre. There is a low proportion of pubs/bars and takeaways. National chains include Costa, Café Nero and Pizza Express. The provision of estate agents, hairdressers/beauty parlours and dry cleaners is particularly strong. Other non-retail and community facilities include a cinema, library, dentists, health centre, vet and health club. The number of banks has declined significantly in recent years. The household survey results also show conflicting views in relation to non-retail, as shown in Table GC6.

Table GC5 - Mix of service uses in Gerrards Cross Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	13	25.0	39.3	24.3	24.6
Hot food/takeaways	5	9.6	4.5	15.0	11.4
Pubs/bars	3	5.8	8.3	11.9	22.0
Banks/other financial services	2	3.8	7.0	7.9	11.3
Betting shops/casinos/amusement	1	1.9	1.9	3.7	6.7
Estate agents/valuers	6	11.5	12.1	7.7	6.2
Travel agents	1	1.9	1.9	1.4	1.1
Hairdressers/beauty parlours	16	30.8	17.5	26.5	15.5
Launderettes/dry cleaners	5	9.6	7.6	1.6	1.1
Sub-total	**52**	**100.0**	**100.0**	**100.0**	**100.0**
Other	9				
Total	**61**				

Source: Experian Goad for Gerrards Cross (May 2022).

Table GC6 - Non-retail services - satisfaction v dissatisfaction in Gerrards Cross (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	8.6	-4.5	4.1	11.0
Pubs / bars	1.8	-4.8	-3.0	0.1
Financial services	1.2	-3.5	-2.4	-1.4
Other services	3.3	-0.5	2.8	1.0
Leisure facilities	8.0	-2.1	5.9	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

14.10 When compared with the Buckinghamshire average, Gerrards Cross has higher levels of net dissatisfaction with pubs/bars and financial services, but higher levels of satisfaction with other services and leisure facilities.

Catchment area

14.11 The household survey results indicate 13% of respondents across the study area had visited shops, services or leisure facilities at Gerrards Cross town centre in the last six months, the fourth lowest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was 1%, the sixth highest figure. The retail capacity analysis suggests Gerrards Cross attracts only 0.7% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from three zones in the southeast of the study area.

14.12 The combined base year turnover of Gerrards Cross is estimated to be £91 million, the eight highest turnover in Buckinghamshire. Gerrards Cross's turnover is split £50 million for convenience retail goods, £15 million for comparison retail goods and £26 million for food/beverage.

14.13 Gerrards Cross has a localised catchment area and its trade draw is primarily food and grocery rather than non-food shopping.

Rental levels

14.14 According to the VOA, Gerrards Cross has the 6th highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £510 per sq.m, comparable with the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are consistent with Gerrards Cross's position in the retail hierarchy and indicate occupier demand is around the average. Zone A rents range from £200 to £510 per sq.m in the prime pitch on Packhorse Road.

Accessibility

14.15 Gerrards Cross Railway Station is located 150 metres to the west of the town centre. There are four bus stops on Packhorse Road. Gerrards Cross town centre has three public car parks with 221 spaces (14 disabled). Short stay charges are £1.70 up to one hour or £3.90 up to three hours. Short stay car parking is relatively expensive when compared with other centres in Buckinghamshire. The Tesco store has 350 car parking spaces. Car parks are accessible to the main shopping area.

14.16 Of the household survey respondents who had visited Gerrards Cross in the last six months, the proximity of the centre to home, work or friends/relatives were important attributes visitors mentioned when compared with other centres in Buckinghamshire. A high proportion of visitors mentioned proximity to home (28.8% compared with the Buckinghamshire average of 20.7%), work (4.4% compared with 4.1%) and friends/relations (6.5% compared with 5.7%).

14.17 These survey respondents were asked what they like about Gerrards Cross town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table GC7.

14.18 When compared with the Buckinghamshire average, Gerrards Cross appears to have higher levels of net dissatisfaction with disabled access. There appear to be higher levels of net satisfaction with train services. The other factors are rated as similar to the Buckinghamshire average.

Table GC7 - Levels of accessibility - satisfaction v dissatisfaction in Gerrards Cross (% of respondents visting centre)

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Car accessibility/traffic congestion	1.6	-2.5	-0.9	-2.9
Disabled access	0	-0.5	-0.5	-0.1
Bus services	2.1	-2.8	-0.7	-0.8
Train services	4.8	-0.6	4.2	0.5
Car parking - amount	4.7	-10.5	-5.8	-5.8
Car parking - cost	2.6	-9.7	-7.1	-7.6
Pedestrianised/traffic free areas	0.7	-1.0	-0.3	1.2
Centre layout	3.1	0	3.1	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Environment and ambience

14.19 Gerrards Cross is primarily located along Packhorse Road, bisected by railway tracks and a central Tesco food store. However, the secondary entrance to Tesco which faced the town centre was closed and inaccessible at the time of the site visit. This detracted from the activity along this stretch of the centre, as well as the utility of the adjoining bus stop and accompanying seating. Through traffic is relatively heavy. To the north of the centre, the draw of Waitrose and the indigenous population of new-build flats and offices provide greater footfall. The south of the centre features wide walkable payments and street parking as well as street furniture including bunting, planters and outdoor seating, however the area was noticeably quieter than the north of the centre and lacks a specific anchor to draw footfall.

14.20 Of the household survey respondents who had visited Gerrards Cross in the last six months, lower proportions of visitors indicated they like the centre's historic character/heritage (0.7% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (1.2% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table GC8.

Table GC8 - Environment and ambience - satisfaction v dissatisfaction in Gerrards Cross (% of respondents visting centre)

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Environment	10.3	-1.4	8.9	16.7
Street cleanliness/maintenance	6.6	-2.7	3.9	3.2
Atmosphere/friendliness	4.1	0.0	4.1	6.0
Undercover shopping	0.0	0.0	0.0	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

14.21 When compared with the Buckinghamshire average, Gerrards Cross has lower levels of net satisfaction with the environment and atmosphere/friendliness. Overall Gerrards Cross is rated by survey respondents as below average when compared with other centres in Buckinghamshire.

Occurrence of crime

14.22 UK Crime Stats indicate there were 377 crimes reported in Gerrards Cross in the year to November 2022, indicating a crime rate of 53.3 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. The town had the 2nd lowest rate of crime of the 14 towns assessed in this study.

14.23 Of the household survey respondents who had visited Gerrards Cross in the last six months, none mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Gerrards Cross's environmental and shopping experience is reasonably good quality.
- There are two large supermarkets. The Tesco and Waitrose are suitable for main and bulk food shopping.
- There is a good provision of non-retail services, particularly hairdressers/beauty parlours, dry cleaners and medical facilities.
- The Everyman cinema which attracts additional customers to the centre.
- The centre benefits from additional trade from commuters passing through the railway station.
- Gerrards Cross has higher levels of satisfaction with non-food shops and supermarkets than the Buckinghamshire average.
- Gerrards Cross has higher levels of satisfaction with other services and leisure facilities.

- The town has the 2nd lowest crime rate in Buckinghamshire and a good perception of security and safety.
- Gerrards Cross has higher levels of visitor satisfaction with train services than the Buckinghamshire average.

Weaknesses

- The centre has a small, localised catchment area, which falls within the sub-regional catchment areas of High Wycombe, Slough and Uxbridge.
- The centre has a limited choice of national multiple retailers.
- The shop vacancy rate is higher than the Buckinghamshire and UK averages, which suggests operator demand is below the supply of premises.
- Through traffic has an impact on the shopping experience.
- Gerrards Cross has higher levels of net dissatisfaction with the affordability of shops, independent/specialist shops and the street market when compared with the Buckinghamshire average.
- Gerrards Cross has higher levels of net dissatisfaction with pubs/bars and financial services.
- Gerrards Cross has higher levels of visitor dissatisfaction with disabled access than the Buckinghamshire average.
- Gerrards Cross is rated below average when compared in terms of environment and ambience when compared with other centres in Buckinghamshire.

Opportunities

- There is potential to continue to build on the centre's entertainment function and improve the evening economy including food/beverage uses, including attracting more commuters using the station and recent examples are the Journeyman and The Taps @GX.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- The relatively large number of vacant premises provide opportunities for further investment, including non-retail services and leisure uses.

Threats

- The centre relies heavily on key anchor stores (Tesco and Waitrose) for spin-off trade.
- Based on the current mix of uses, the continued national decline of comparison goods shop in town centres could lead to a significant increase in vacant shops in the centre.
- Large vacant units in prominent locations could undermine confidence for new investors.

Future priorities

Table GC9 Gerrards Cross Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Medium
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Medium
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Medium
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Low
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Medium
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Low
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	Medium
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	High

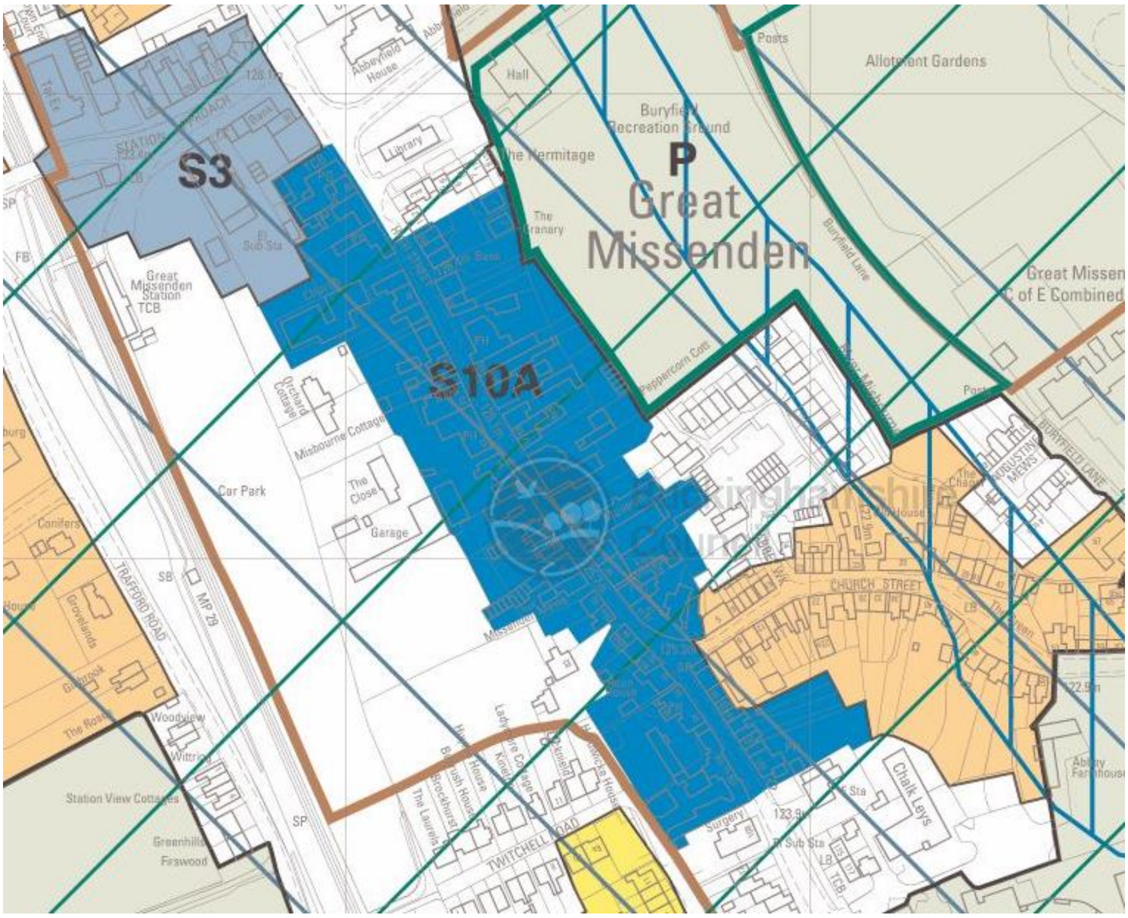
Appendix 15 Great Missenden health check

Great Missenden

Introduction

15.1 Great Missenden is designated as a *'Local Centre'* in the Chiltern District Local Plan (adopted 1997 and Consolidated September 2007 and November 2011), which placed it at the second tier of the retail hierarchy of centres for the Chiltern plan area. The designated Shopping boundary is shown in Figure GM. All the designated Shopping area is within a Conservation Area. The centre is linear stretching approximately 400 metres north to south.

Figure GM - Great Missenden Town Centre Boundary



Source: Chiltern Local Plan Proposals Map.

Mix of uses

15.2 Great Missenden has 54 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 4,024 sq.m gross, an average of 77 sq.m gross per unit. Great Missenden is the second smallest of the 14 main town centres in Buckinghamshire, only larger than Winslow. There is a monthly artisans market. The diversity of uses within the centre is set out in Table GM1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table GM1 - Mix of shops/service units in Great Missenden Town Centre

Type of Unit	**Units (Number)**	**Units (%)**	**Bucks units average (%)**	**UK unit average (%)**
Convenience goods retail	4	7.7	7.4	9.8
Comparison goods retail	14	26.9	31.2	28.8
Financial/professional services	3	5.8	9.4	8.9
Restaurants/Cafés	6	11.5	10.6	10.2
Pubs/Bars	3	5.8	4.4	5.0
Hot food takeaways	1	1.9	5.0	6.3
Other non-retail services	15	28.8	19.5	16.6
Vacant	6	11.5	12.6	14.4
Total	**52**	**100.0**	**100.0**	**100.0**

Source: Lichfields' survey for Great Missenden (April 2023).

15.3 The centre's mix of units is broadly in line with the national average, but there is a higher proportion of other non-retail services and a relatively low proportion of comparison goods retail and financial/professional services. There were 6 vacant units equating to a vacancy rate of 11.5%, which is below both the Buckinghamshire and UK averages. Most of the vacant units are small (under 150 sq.m). Quarter 1 - 2023 information collected by the Council's Economic Growth and Regeneration department suggested 7 vacant units.

Table GM2 - Mix of shops/service floorspace in Great Missenden Town Centre

Type of Floorspace	**Floorspace (sq.m)**	**Floorspace (%)**	**UK floorspace average (%)**
Convenience goods retail	697	17.3	17.7
Comparison goods retail	685	17.0	33.9
Financial/professional services	186	4.6	7.3
Restaurants/Cafés	563	14.0	7.2
Pubs/Bars	289	7.2	6.5
Hot food takeaways	90	2.2	3.4
Other non-retail services	868	21.6	8.6
Vacant	646	16.1	15.4
Total	**4,024**	**100.0**	**100.0**

Source: Lichfields' survey for Great Missenden (April 2023) and VOA floorspace data.

Retailer representation

15.4 Great Missenden has a small selection of comparison shops (14). Most of the Goad categories are not represented in the centre and the choice of outlets in each represented category is limited. The comparison goods outlets are small independent traders rather than national multiples.

Table GM3 - Mix of comparison goods stores in Great Missenden Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	5	35.7	44.1	21.1	24.2
Furniture, carpets and textiles	2	14.3	10.1	7.6	7.9
Books, arts, cards and stationers	1	7.1	8.8	6.2	4.1
Electrical, music and photography	0	0.0	0.0	9.4	5.0
DIY, hardware and homeware	0	0.0	0.0	7.0	13.0
China, glass and gifts	3	21.4	15.6	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	2	14.3	17.5	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	0	0.0	0.0	2.3	0.9
Toys, hobby, cycle and sports	0	0.0	0.0	5.4	5.8
Jewellers	1	7.1	3.9	5.1	2.2
Charity and second-hand shops	0	0.0	0.0	9.8	6.6
Other comparison goods retailers	0	0.0	0.0	5.5	3.2
Total	**14**	**100.0**	**100.0**	**100.0**	**100.0**

15.5 The household survey respondents were asked what they like about Great Missenden and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table GM4.

Table GM4 - Shopping provision - satisfaction v dissatisfaction in Great Missenden (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	0.3	-3.7	-3.4	1.1
Food shops (bakers/butchers/grocers)	1.0	-5.8	-4.8	-2.4
Clothing shops	0.3	-3.4	-3.1	-5.1
Quality of shops	0.0	-3.7	-3.7	0.2
High street multiples	1.0	-4.7	-3.7	-2.2
Independent/specialist shops	16.9	-9.4	7.6	3.7
Affordability of shops	0.0	-2.7	-2.7	-3.3
Street market	4.2	-2.8	1.4	1.3
Supermarkets	0.7	-1.5	-0.8	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

15.6 When compared with the Buckinghamshire average, Great Missenden has higher levels of net dissatisfaction with non-food shops, food shops, quality of shops, high street multiples and supermarkets. However there are higher levels of satisfaction with independent/ specialist shops.

Non-retail services

15.7 Great Missenden has a reasonable service sector (comprising 28 units in total) for a centre of its size. However, there are no financial services, betting shops, dry cleaners or travel agents. There is an under-provision of takeaways. The provision of hairdressers/beauty parlours is strong. Other non-retail and community facilities include a library, churches, GP surgeries and a museum. The household survey results also show conflicting views in relation to non-retail, as shown in Table GM6.

Table GM5 - Mix of service uses in Great Missenden Town Centre

Type of Unit	**Unit (No.)**	**Unit (%)**	**Floorspace (%)**	**UK unit ave. (%)**	**UK space ave. (%)**
Restaurants/cafés	6	28.6	37.6	24.3	24.6
Hot food/takeaways	1	4.8	6.0	15.0	11.4
Pubs/bars	3	14.3	19.3	11.9	22.0
Banks/other financial services	0	0.0	0.0	7.9	11.3
Betting shops/casinos/amusement	0	0.0	0.0	3.7	6.7
Estate agents/valuers	3	14.3	12.4	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	8	38.1	24.7	26.5	15.5
Launderettes/dry cleaners	0	0.0	0.0	1.6	1.1
Sub-total	**21**	**100.0**	**100.0**	**100.0**	**100.0**
Other	7				
Total	**28**				

Source: Lichfields' survey for Great Missenden (April 2023).

Table GM6 - Non-retail services - satisfaction v dissatisfaction in Great Missenden (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	18.2	-1.3	16.9	11.0
Pubs / bars	6.8	-2.9	3.9	0.1
Financial services	6.0	0.0	6.0	-1.4
Other services	0.0	0.0	0.0	1.0
Leisure facilities	18.2	-1.3	16.9	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

15.8 When compared with the Buckinghamshire average, Great Missenden has higher levels of net dissatisfaction with pubs/bars and leisure facilities, but higher levels of satisfaction with other services.

Catchment area

15.9 The household survey results indicate 9% of respondents across the study area had visited shops, services or leisure facilities at Great Missenden town centre in the last six months, the second lowest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was only 0.1%. The retail capacity analysis suggests Great Missenden attracts only 0.3% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from the local zone only.

15.10 The combined base year turnover of Great Missenden is estimated to be £36 million, the third lowest turnover in Buckinghamshire. This turnover is split £16 million for convenience retail goods, £6 million for comparison retail goods and £14 million for food/beverage. Great Missenden has a small, localised catchment area and limited trade draw.

Rental levels

15.11 According to the VOA, Great Missenden has the 5th lowest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £350 per sq.m, below the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are consistent with Great Missenden's position in the retail hierarchy and indicate occupier demand is below average. Zone A rents range from £200 to £350 per sq.m in the prime pitch on Station Approach and the High Street.

Accessibility

15.12 Station Approach links Great Missenden Railway Station to the High Street. There is a bus stop near the railway station and four stops on the High Street and stops on Link Road. Great Missenden has two public car parks with 115 spaces (4 disabled), excluding the railway station car park. Short stay charges are £0.80 up to one hour or £2.10 up to three hours. These car parks are over 150-metres from the main shopping area.

15.13 Of the household survey respondents who had visited Great Missenden in the last six months, the proximity of the centre to home, work or friends/relatives were important attributes visitors mentioned when compared with other centres in Buckinghamshire. A high proportion of visitors mentioned proximity to home (21.7% compared with the Buckinghamshire average of 20.7%) and friends/relations (8.3% compared with 5.7%), but a slightly lower proportion mentioned work (2.9% compared with 4.1%).

15.14 These survey respondents were asked what they like about Great Missenden town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table GM7.

15.15 When compared with the Buckinghamshire average, Great Missenden has higher levels of net dissatisfaction with car accessibility/traffic congestion, bus services and the cost of car parking. There appear to be higher levels of net satisfaction with train services.

Table GM7 - Levels of accessibility - satisfaction v dissatisfaction in Great Missenden (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-4.4	-4.4	-2.9
Disabled access	0	0	0	-0.1
Bus services	1.9	-4.2	-2.3	-0.8
Train services	4.8	0	4.8	0.5
Car parking - amount	5.1	-8.7	-3.6	-5.8
Car parking - cost	1.5	-14.8	-13.3	-7.6
Pedestrianised/traffic free areas	4.4	-0.7	3.7	1.2
Centre layout	1.0	0.0	1.0	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Environment and ambience

15.16 Great Missenden has relatively low levels of through traffic. Pavements are generally narrow but well maintained. There are limited opportunities for street furniture or landscaped areas. The High Street has many attractive period buildings. The quality of the shopping environment is less attractive along the Station Approach.

15.17 Of the household survey respondents who had visited Great Missenden in the last six months, a slightly lower proportion of visitors indicated they like the centre's historic character/heritage (2.6% compared with the Buckinghamshire average of 3.3%) but a higher proportion mentioned the centre's traditional quaintness (16.9% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table GM8.

Table GM8 - Environment and ambience - satisfaction v dissatisfaction in Great Missenden (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	18.2	-1.3	16.9	16.7
Street cleanliness/maintenance	6.8	-2.9	3.9	3.2
Atmosphere/friendliness	6.0	0.0	6.0	6.0
Undercover shopping	0.0	0.0	0.0	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

15.18 When compared with the Buckinghamshire average, Great Missenden has similar levels of net satisfaction with the environment, street cleanliness and atmosphere.

Occurrence of crime

15.19 UK Crime Stats indicate there were 377 crimes reported in Great Missenden in the year to November 2022, indicating a crime rate of 53.1 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Great Missenden had the lowest rate of crime of the 14 towns assessed in this study.

15.20 Of the household survey respondents who had visited Great Missenden in the last six months, only 1% mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Despite being linear in form, Great Missenden is a compact centre.
- Great Missenden is an attractive town, with a traditional high street containing many historic buildings.
- The centre has a high proportion of non-retail services, particularly hairdressers/beauty parlours, community and medical facilities.
- The centre benefits from additional trade from commuters passing through the railway station.
- The Roald Dahl Museum and Story Centre helps to attract additional visitors to the centre.
- Great Missenden has higher levels of satisfaction with independent/specialist shops than the Buckinghamshire average.
- Great Missenden has higher levels of satisfaction with other services.
- The town has the lowest crime rate in Buckinghamshire and a good perception of security and safety.
- Great Missenden has higher levels of visitor satisfaction with train services than the Buckinghamshire average.
- Great Missenden is rated as slightly above average in terms of environment and ambience when compared with other centres in Buckinghamshire.

Weaknesses

- Great Missenden is the second smallest centre in Buckinghamshire with a limited number of shops. The range and choice of comparison goods shops is limited.
- The centre has a small, localised catchment area, which falls within the sub-regional catchment areas of High Wycombe and Hemel Hempstead.
- There are many residential units interspersed with shops and these breaks in shop frontages, which may discourage shoppers from visiting the far end of the High Street.
- The centre has a low proportion of comparison goods shops and a limited range and choice.
- There are no banks/financial services or dry cleaners.
- Shop units are primarily period buildings that are narrow and limited in size.

- Great Missenden has higher levels of net dissatisfaction with non-food shops, food shops, quality of shops, high street multiples and supermarkets when compared with the Buckinghamshire average.
- Great Missenden has higher levels of net dissatisfaction with pubs/bars and leisure facilities.
- Great Missenden has higher levels of visitor dissatisfaction with car accessibility/traffic congestion, bus services and the cost of car parking than the Buckinghamshire average.

Opportunities

- Environmental improvements along Station Approach could improve linkages to the centre and increase trade from commuters.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- As a museum visitor destination, there is an opportunity to improve the food and beverage offer. The museum provides an opportunity to more actively market shops and services available within the town centre.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.
- Gaps in shop frontages could reduce pedestrian flows on peripheral areas leading to a contraction of the centre.

Future priorities

Table GM9 Great Missenden Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	High
Retail Offer Retailer offer; retailer representation	High
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Medium
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	High
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Medium
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Medium
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Medium
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

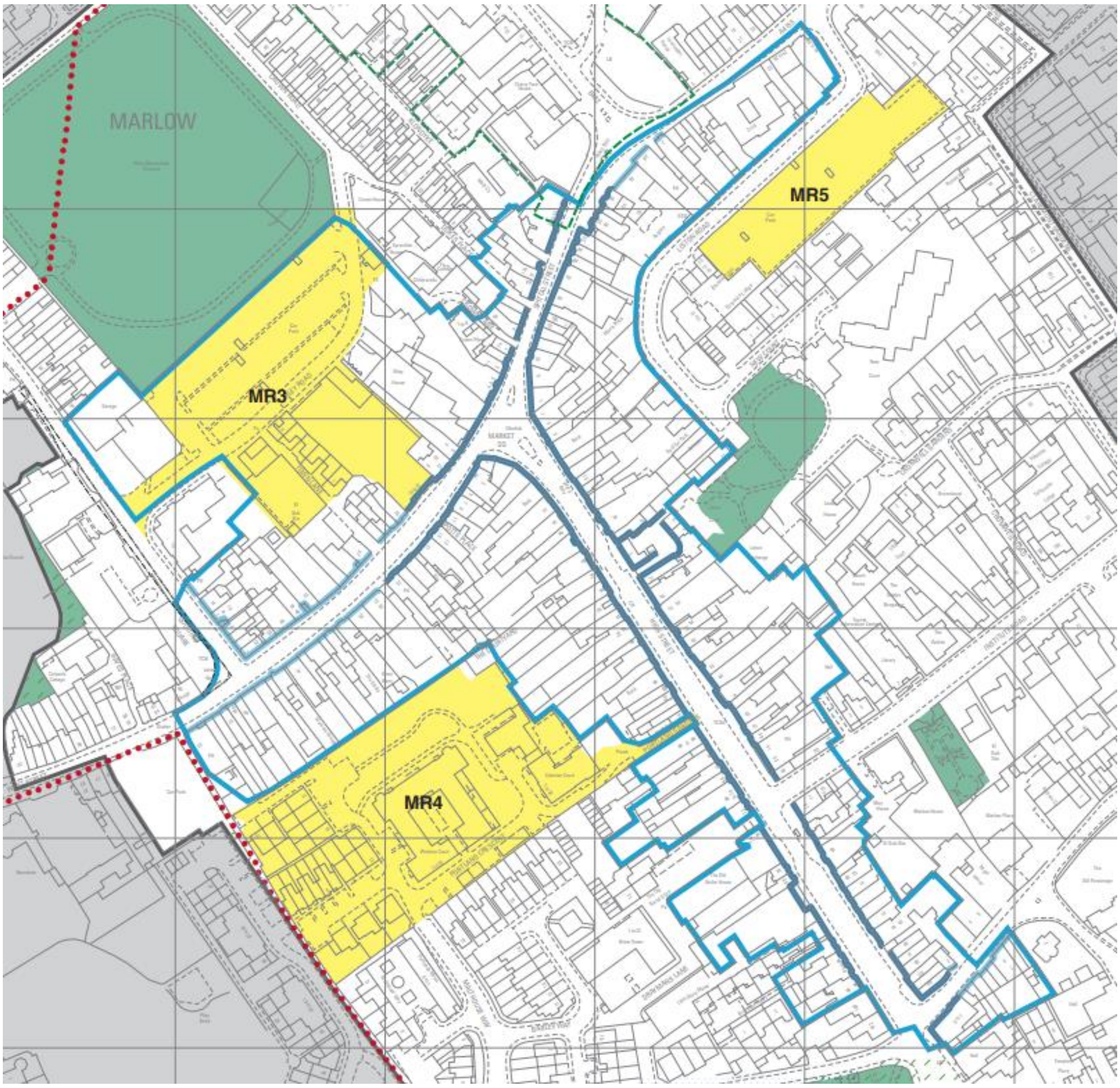
Appendix 16 Marlow health check

Marlow

Introduction

16.1 Marlow Town Centre is designated as an *'Other Town Centre'* within the Wycombe District Local Plan (adopted 2019), which places it within the second level of the retail hierarchy of centres for the Wycombe plan area. The designated town centre boundary (see Figure MA) is concentrated along the High Street, up to the T-junction with Spittal Street and West Street, which feature a concentration of shops, restaurants and cafes including The Coach Michelin starred restaurant. The entirety of the centre falls within the Marlow Conservation Area and features numerous listed buildings.

Figure MA - Marlow Town Centre Boundary



Source: Wycombe Local Plan Proposals Map.

16.2 The town centre is located on the northern bank of the River Thames, with the High Street leading to the Marlow Suspension Bridge (Grade I listed). This proximity to a river crossing, along with the centre's picturesque setting, historic streets and architecture give Marlow its distinctive character. The town is predominantly surrounded by low-density residential housing and adjoins Riley Park to the north and Higginson Park to the south, which extends into the Green Belt beyond the settlement boundary.

Mix of uses

16.3 Marlow has 206 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 35,300 sq.m gross, an average of 171 sq.m gross per unit. Marlow is the third largest centre in Buckinghamshire after High Wycombe and Aylesbury. There is a monthly street market. The diversity of uses within the centre is set out in Table MA1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table MA1 - Mix of shops/service units in Marlow Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	15	7.3	7.4	9.8
Comparison goods retail	88	42.7	31.2	28.8
Financial/professional services	17	8.3	9.4	8.9
Restaurants/Cafés	25	12.1	10.6	10.2
Pubs/Bars	12	5.8	4.4	5.0
Hot food takeaways	4	1.9	5.0	6.3
Other non-retail services	30	14.6	19.5	16.6
Vacant	15	7.3	12.6	14.4
Total	**206**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Marlow (August 2022).

16.4 The centre's mix of units is broadly in line with the national average although it has a higher proportion of restaurants/cafés, and pubs/bars and a lower proportion of takeaways. Whilst the proportion of comparison goods retailers (42.7%) has fallen from the health check undertaken for the 2014 Wycombe Town Centres & Retail Study (54.5%), this is a general trend seen across most centres in the UK, and Marlow remains consistently above the UK average.

16.5 Vacancies (15, equating to 7.3%) are also significantly lower than the UK average, though the vacancy rate is slightly higher than the proportion recorded in 2014 when only 12 vacant units were recorded. More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests 11 vacant units.

16.6 Convenience units take up a lower proportion of floorspace than the UK average, despite a healthy representation in the centre of M&S Simply Food, Lidl (having taken the former Waitrose unit) and both a Sainsbury's and Sainsbury's Local, alongside Gail's Bakery and independent butchers, delis, and greengrocers. Restaurants/cafés take up almost twice the national average proportion of floorspace across Marlow, reflecting their importance to the wider draw and character of the town centre.

Table MA2 - Mix of shops/service floorspace in Marlow Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	4,410	12.5	17.7
Comparison goods retail	13,670	38.7	33.9
Financial/professional services	3,570	10.1	7.3
Restaurants/Cafés	4,810	13.6	7.2
Pubs/Bars	3,410	9.7	6.5
Hot food takeaways	380	1.1	3.4
Other non-retail services	2,870	8.1	8.6
Vacant	2,180	6.2	15.4
Total	**35,300**	**100.0**	**100.0**

Source: Experian Goad for Marlow (August 2022).

16.7 The total proportion of vacant floorspace in the centre remains below the national average, to an even greater degree than the number of units reflecting the fact that vacancies trend toward smaller units (averaging 145 gross sq.m per unit).

Retailer representation

16.8 Marlow has a good selection of comparison shops (88) for a centre of its size, with only one category not represented in the centre (variety, department and catalogue) and a lower than average proportion of DIY, hardware and homeware stores. Overall, Marlow has a good mix and selection of most categories, with a particularly strong provision of clothing and footwear, and furniture, carpets and textiles stores for a centre of its size when compared with the average.

Table MA3 - Mix of comparison goods stores in Marlow Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	30	34.1	38.7	21.1	24.2
Furniture, carpets and textiles	12	13.6	12.2	7.6	7.9
Books, arts, cards and stationers	6	6.8	5.3	6.2	4.1
Electrical, music and photography	2	2.3	0.8	9.4	5.0
DIY, hardware and homeware	4	4.5	5.6	7.0	13.0
China, glass and gifts	3	3.4	1.9	5.6	2.6
Cars, motorcycles and accessories	2	2.3	10.6	1.3	2.1
Chemists, drug stores and opticians	9	10.2	12.9	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	2	2.3	0.7	2.3	0.9
Toys, hobby, cycle and sports	3	3.4	1.8	5.4	5.8
Jewellers	4	4.5	2.0	5.1	2.2
Charity and second-hand shops	7	8.0	4.9	9.8	6.6
Other comparison goods retailers	4	4.5	2.6	5.5	3.2
Total	**88**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Marlow (August 2022).

16.9 Marlow also features a relatively strong provision of national multiple comparison retailers (excluding charity shops). Nonetheless, most comparison shops in the centre are small independent traders. The multiple comparison retailers include:

Table MA4- Marlow's comparison multiples

Accessorize	Jigsaw	Oka	Specsavers
Biggie Best	JoJo Maman Bébé	Poggenpohl	Superdrug
Boots Opticians	Mandarin Stone	Premier Mobile	Sweaty Betty
Charles Tyrwhitt	Mint Velvet	Sahara	The White Company
Clarendon Fine Art	Moda in Pelle	Snappy Snaps	Timpson
Harvey Jones	Mountain Warehouse	Space NK	Toast

Source: Experian Goad for Marlow (August 2022).

16.10 The household survey respondents were asked what they like about Marlow and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table MA5.

Table MA5 - Shopping provision - satisfaction v dissatisfaction in Marlow (% of respondents visiting centre

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Non-food shops	7.8	-3.2	4.6	1.1
Food shops (bakers/butchers/grocers)	0.8	-0.6	0.2	-2.4
Clothing shops	1.7	-3.2	-1.6	-5.1
Quality of shops	4.0	-2.2	1.8	0.2
High street multiples	4.4	-3.4	1.0	-2.2
Independent/specialist shops	15.6	-3.5	12.2	3.7
Affordability of shops	2.5	-9.7	-7.3	-3.3
Street market	1.7	-2.5	-0.8	1.3
Supermarkets	2.3	-2.5	-0.2	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

16.11 When compared with the Buckinghamshire average, Marlow has higher levels of net dissatisfaction with the affordability of shop, the street market and supermarkets. However there are higher level of satisfaction with non-food shops, food shops, quality of shops and independent/specialist shops.

Non-retail services

16.12 Marlow also has a strong service sector (comprising 109 units in total) with only travel agents not represented in the centre. Breaking down the individual services when compared with the national average, there is a significantly higher proportion of restaurants/cafes and pubs/bars which provide a mix of daytime and night-time facilities, but a lower proportion of hot food/takeaways and betting shops/casinos/amusement. Other non-retail and community facilities include a library, theatre, community hall, health centre, dentist and nursery.

16.13 There is a strong mixture of independent and multiple food/beverage outlets reflecting the character of the centre. Multiples include Pizza Express, Cote Brasserie, Giggling Squid, The Ivy, Gail's Bakery, Costa and Starbucks, in addition to The Ship and George & Dragon public houses. The centre no longer has banks or building societies within the financial services category. The household survey results also show conflicting views in relation to non-retail, as shown in Table MA7.

Table MA6 - Mix of service uses in Marlow Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	25	31.6	35.3	24.3	24.6
Hot food/takeaways	4	5.1	2.8	15.0	11.4
Pubs/bars	12	15.2	25.0	11.9	22.0
Banks/other financial services	6	7.6	9.3	7.9	11.3
Betting shops/casinos/amusement	1	1.3	0.8	3.7	6.7
Estate agents/valuers	8	10.1	10.3	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	21	26.6	15.9	26.5	15.5
Launderettes/dry cleaners	2	2.5	0.7	1.6	1.1
Sub-total	**79**	**100.0**	**100.0**	**100.0**	**100.0**
Other	30				
Total	**109**				

Source: Experian Goad for Marlow (August 2022).

Table MA7 - Non-retail services - satisfaction v dissatisfaction in Marlow (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	24.6	2.3	22.3	11.0
Pubs / bars	5.0	1.3	3.7	0.1
Financial services	1.2	3.0	-1.8	-1.4
Other services	0.7	0.7	0.0	1.0
Leisure facilities	2.8	2.3	0.6	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

16.14 When compared with the Buckinghamshire average, Marlow has higher levels of net satisfaction with cafés/restaurants, pubs/bars and leisure services.

Catchment area

16.15 The household survey results indicate 25% of respondents across the study area had visited shops, services or leisure facilities at Marlow town centre in the last six months, the third highest percentage for the 14 assessed main centres in Buckinghamshire, but the proportion of respondents who do most of their non-food shopping was only 0.8%. The retail capacity analysis suggests Marlow attracts 1.8% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from three zones in the south of the study area.

16.16 The combined base year turnover of Marlow is estimated to be £168 million, the third highest turnover in Buckinghamshire. This turnover is split £47 million for convenience retail goods, £38 million for comparison retail goods and £83 million for food/beverage.

16.17 Marlow has a relatively small, localised catchment area, but has a good mixed trading base. The attraction of food/beverage trips is particularly strong.

Rental levels

16.18 According to the VOA, Marlow has the highest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £1,150 per sq.m, more than double the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are very strong for a centre of its size and indicate occupier demand is well above the supply of available premises. Zone A retail rents vary throughout the centre. Zone A rents range from £765 to £1,150 per sq.m in the prime pitch along the High Street. Along Spittal Street, Zone A rents range from £525 to £900 per sq.m, with higher rates identified closer to the central Market Square, as would be expected. Along West Street, Zone A rents drop to between £470 to £700 per sq.m.

Accessibility

16.19 Marlow Railway Station is located half a mile outside of the town centre to the west. The station is single platform and does not feature a dedicated ticket office. The station is operated by Great Western Railway (GWR) and offers hourly services to Bourne End, with onward connections available to Maidenhead.

16.20 The northern end of the centre is served by the 800/850 High Wycombe to Reading bus route (Arriva), whilst the Marlow County Rider service (Red Eagle) operates the 155/158/160 route from the High Street to Maidenhead (Wednesdays) and High Wycombe (all other weekdays).

16.21 There are eight car parks in Marlow offering 835 spaces, all of which are located on the outskirts of the centre (including station approach). Short stay charges are £0.90 up to one hour or £2.60 up to three hours. These car parks are accessible to the main shopping area. On-street parking is available throughout the centre, primarily free 1 hour (2 hours in The Causeway, to the south of the centre).

16.22 Of the household survey respondents who had visited Marlow in the last six months, the proximity of the centre to home, work or friends/relatives were less important attributes visitors mentioned when compared with other centres in Buckinghamshire. A low proportion of visitors mentioned proximity to home (12.8% compared with the Buckinghamshire average of 20.7%) and friends/relations (3.8% compared with 5.7%), but a similar proportion mentioned work (3.9% compared with 4.1%).

16.23 These survey respondents were asked what they like about Marlow town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table MA8.

16.24 When compared with the Buckinghamshire average, Marlow has higher levels of net dissatisfaction with car accessibility/traffic congestion, train services, amount and cost of car parking. There appear to be higher levels of net satisfaction with disabled access.

Table MA8 - Levels of accessibility - satisfaction v dissatisfaction in Marlow (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-3.6	-3.6	-2.9
Disabled access	1.3	0.0	1.3	-0.1
Bus services	1.3	-2.2	-0.9	-0.8
Train services	0.1	-0.7	-0.6	0.5
Car parking - amount	4.4	-20.8	-16.4	-5.8
Car parking - cost	1.4	-13.2	-11.8	-7.6
Pedestrianised/traffic free areas	2.7	-2.2	0.5	1.2
Centre layout	2.6	0.0	2.6	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Environment and ambience

16.25 Marlow is located on the northern bank of the River Thames which, along with the centre's picturesque setting, historic streets and architecture, give Marlow its distinctive character supported by bunting, wide tree-lined pavement and outdoor seating to the south of the centre. The double-roundabout at the end of the High Street does not provide a clear crossing point, impeding accessibility to Higginson Park and the Marlow Suspension Bridge (Grade I listed) beyond the centre. The north of the centre at the T-junction with West Street and Spittal Street was less busy at the time of our visits, exacerbated by a prominent vacancy at the Grade II* listed former Town Hall (which has since been redeveloped as an Everyman Cinema).

16.26 Of the household survey respondents who had visited Marlow in the last six months, slightly higher proportions of visitors indicated they like the centre's historic character/heritage (3.5% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (7.8% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table MA9.

Table MA9 - Environment and ambience - satisfaction v dissatisfaction in Marlow (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	42. 9	-0.6	42.3	16.7
Street cleanliness/maintenance	6.9	-1.0	5.9	3.2
Atmosphere/friendliness	10.3	-0.6	9.7	6.0
Undercover shopping	0.3	-1.5	-1.2	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

16.27 When compared with the Buckinghamshire average, Marlow has higher levels of net satisfaction with the environment, street cleanliness/maintenance and atmosphere. There are higher levels of dissatisfaction with the lack of covered shopping areas. Overall Marlow is rated highly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Occurrence of crime

16.28 UK Crime Stats indicate there were 871 crimes reported in Marlow in the year to November 2022, indicating a crime rate of 60.8 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period and is the 4th lowest rate of crime of the 14 towns assessed in this study.

16.29 Of the household survey respondents who had visited Marlow in the last six months, none mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Healthy provision of convenience supermarkets within the centre (M&S Simply Food, Lidl, Sainsburys x2).
- The centre has a high proportion of comparison goods shops and there is a good balance between national multiple and independent operators and a wide range and choice of shops.
- There is a strong offering of high-quality restaurants/cafés and pubs, contributing to a regional draw.
- Marlow has higher levels of satisfaction with non-food shops, food shops, quality of shops and independent/specialist shops than the Buckinghamshire average.
- Marlow has higher levels of net satisfaction with cafés/restaurants, pubs/bars and leisure services.
- The vacancy rate is below the UK averages for both the number of vacant units and proportion of vacant floorspace.
- The town has the 4th lowest crime rate in Buckinghamshire and a good perception of security and safety.
- Marlow has higher levels of visitor satisfaction with disabled access than the Buckinghamshire average.
- Marlow is rated highly by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.
- The town centre, river and open space provide an attractive historic environment, which is a pleasant place to visit.
- The town has a relatively low crime rate.
- The new Everyman Cinema opened in late Autumn 2023 in the former Steamer Trading Cookshop on Market Place, should attract more visitors to the centre, particularly in the evenings.

- The former M&Co store has planning permission in place for Wetherspoons ('The Swan Uppers'), which will also improve the evening economy.

Weaknesses

- Marlow is bisected by roads, providing some barriers to pedestrian movement.
- Marlow has higher levels of net dissatisfaction with the affordability of shop, the street market and supermarkets when compared with the Buckinghamshire average.
- The shop unit sizes are primarily narrow and limited in size due to the historic nature of the centre. This limits the possibility for larger format stores.
- Marlow has higher levels of visitor dissatisfaction with car accessibility/traffic congestion, train services, amount and cost of car parking than the Buckinghamshire average.
- The sense of arrival at the railway station is relatively poor and is not well connected to the town centre.
- There is relatively limited provision of residential housing within the centre itself (although the area surrounding the centre is predominantly residential).

Opportunities

- As a popular visitor destination, there is an opportunity to build-on and further strengthen the evening/night-time economy.
- Increased 'staycation' demand could increase the number of visitors to the town, providing spin off benefits to shop and services in the town centre.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- The attraction of the centres' restaurants/cafés and pubs (particularly noting the Michelin star ratings) provides opportunities for linked place marketing, events, and complimentary facilities.

Threats

- The historic character of the town centre, particularly in terms of the conservation area designation and statutorily listed buildings, could restrict the growth ambitions of existing retailers/operators, as well as new modern retailers/operators due to the lack of larger format stores and new experimental formats.
- The relocation of the Waitrose store may reduce footfall, affecting businesses in that part of the centre, although this may be addressed through the redevelopment and reoccupation of the building by Lidl.
- The limited number of vacant stores and relatively high retailer demand will reduce opportunities for new investors, innovative and unproven concepts and start-ups.

Future priorities

Table MA10 Marlow Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	Medium
Retail Offer Retailer offer; retailer representation	Low
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Low
Appearance Visual appearance; cleanliness; ground floor frontages	Low
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Low
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Medium
Place Marketing Centre marketing; marketing; orientation/flow	Low
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	High
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Low
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Low
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	High
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Low
Innovation Opportunities to experiment; retail innovation	High

Appendix 17 Princes Risborough health check

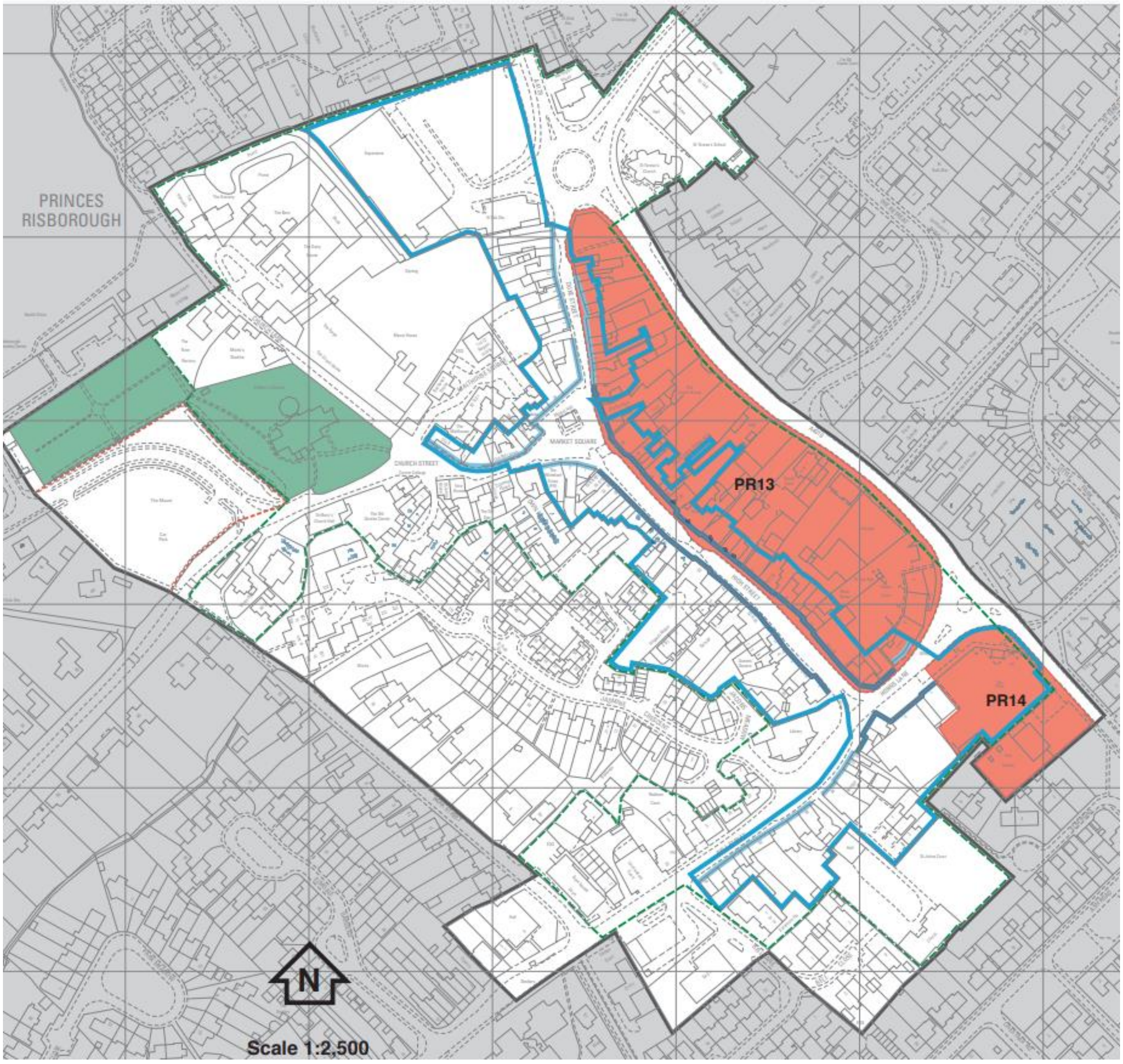
Princes Risborough

Introduction

17.1 Princes Risborough Town Centre is designated as an *'Other Town Centre'* within the Wycombe District Local Plan (adopted 2019), which placed it at the second tier of the retail hierarchy of centres for the Wycombe plan area.

17.2 The Adopted Local Plan identifies a Primary Shopping Area (PSA) and a wider town centre boundary, as shown in Figure PR below. The PSA comprised primary and secondary shopping frontages. The primary shopping frontages are focused along the central section of the High Street and Horns Lane. The secondary frontages are on peripheral parts of the centre including Bell Street, Duke Street and Market Square. The wider town centre includes the Tesco store, fire station and residential areas to the west of the PSA.

Figure PR Princes Risborough Town Centre Boundary



Source: Wycombe Local Plan Proposals Map.

Mix of uses

17.3 Princes Risborough has 103 shop and services units (excluding office and leisure/ community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 14,810 sq.m gross, an average of 144 sq.m gross per unit. Princes Risborough is the eight largest centre in Buckinghamshire. There is a street market on Thursdays (about 10 stalls) and a farmers market. The diversity of uses within the centre is set out in Table PR1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table PR1 - Mix of shops/service units in Princes Risborough Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	10	9.7	7.4	9.8
Comparison goods retail	34	33.0	31.2	28.8
Financial/professional services	12	11.7	9.4	8.9
Restaurants/Cafés	8	7.8	10.6	10.2
Pubs/Bars	4	3.9	4.4	5.0
Hot food takeaways	4	3.9	5.0	6.3
Other non-retail services	20	19.4	19.5	16.6
Vacant	11	10.7	12.6	14.4
Total	**103**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Princes Risborough (October 2021).

17.4 The centre's mix of units is broadly in line with the Buckinghamshire and UK averages. There is a good provision of comparison goods retail and financial/professional services, but an under-provision of restaurant/cafés and takeaways.

17.5 Consistent with the general trend seen across most centres in the UK, the proportion of comparison goods retailers has fallen from 46.1% in 2014 to 33.0% (42.7%), based on the health check undertaken for the 2014 Wycombe Town Centres & Retail Study.

Table PR2 - Mix of shops/service floorspace in Princes Risborough Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	4,290	29.0	17.7
Comparison goods retail	3,830	25.9	33.9
Financial/professional services	1,280	8.6	7.3
Restaurants/Cafés	780	5.3	7.2
Pubs/Bars	540	3.6	6.5
Hot food takeaways	440	3.0	3.4
Other non-retail services	1,710	11.5	8.6
Vacant	1,940	13.1	15.4
Total	**14,810**	**100.0**	**100.0**

Source: Experian Goad for Princes Risborough (October 2021).

17.6 The centre has a below average vacancy rate (10.7%) with 11 vacant units. Only 4 vacant units were recorded in 2014. There is a concentration of 6 vacant units in the Duke Street/Market Square area. More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests 6 vacant units.

17.7 Convenience units take up a similar proportion of units when compared with the UK average, due to the large Tesco and M&S Simply Food stores. These stores are supported by smaller Co-op, McColl's and small specialists (butcher, baker, deli and off-licence).

Retailer representation

17.8 Princes Risborough has a reasonable selection of comparison shops (34) for a centre of its size, with only two categories not represented in the centre (variety, department and catalogue and car accessories). However, the choice of outlets in other categories is relatively limited. The provision of charity shops is significantly above average. Overall, Princes Risborough has a reasonable range of comparison shops but the choice within each category is limited.

Table PR3 - Mix of comparison goods stores in Princes Risborough Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	2	5.9	9.7	21.1	24.2
Furniture, carpets and textiles	4	11.8	10.7	7.6	7.9
Books, arts, cards and stationers	1	2.9	0.8	6.2	4.1
Electrical, music and photography	3	8.8	4.2	9.4	5.0
DIY, hardware and homeware	1	2.9	0.8	7.0	13.0
China, glass and gifts	5	14.7	8.9	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	5	14.7	26.4	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	2	5.9	3.7	2.3	0.9
Toys, hobby, cycle and sports	1	2.9	3.1	5.4	5.8
Jewellers	1	2.9	0.8	5.1	2.2
Charity and second-hand shops	7	20.6	24.3	9.8	6.6
Other comparison goods retailers	2	5.9	6.8	5.5	3.2
Total	**34**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Princes Risborough (October 2021).

17.9 Excluding charity shops, the provision of national multiple comparison goods outlets is small, but includes WH Smiths, Boots Opticians and Lloyds Pharmacy. Most outlets are small independent businesses. Costa and Domino's Pizza are the main food/beverage multiples.

17.10 The household survey respondents were asked what they like about Princes Risborough and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table PR4.

Table PR4 - Shopping provision - satisfaction v dissatisfaction in Princes Risborough (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	5.7	-8.0	-2.3	1.1
Food shops (bakers/butchers/grocers)	0.2	-2.4	-2.3	-2.4
Clothing shops	2.6	-8.2	-5.6	-5.1
Quality of shops	2.0	-4.2	-2.2	0.2
High street multiples	3.8	-3.6	0.2	-2.2
Independent/specialist shops	13.8	-5.4	8.5	3.7
Affordability of shops	1.6	-4.1	-2.4	-3.3
Street market	6.6	-1.5	5.1	1.3
Supermarkets	4.5	-2.3	2.2	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

17.11 When compared with the Buckinghamshire average, Princes Risborough has higher levels of net dissatisfaction with non-food shops, clothing shops and quality of shops. However there are higher level of satisfaction with high street multiples, independent/specialist shops, the street market and supermarkets.

Non-retail services

17.12 Princes Risborough has a reasonable service sector (comprising 48 units in total) for a centre of its size. However, there are no dry cleaners or travel agents. There is a relative under-provision of all food/beverage uses and financial services. The provision of hairdressers/beauty parlours and estate agents is relatively strong. Other non-retail and community facilities include car repair garages, dentist, petrol station, health centre, nursery, library and social clubs.

17.13 The household survey results also show conflicting views in relation to non-retail, as shown in Table PR6.

Table PR5 - Mix of service uses in Princes Risborough Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	8	20.0	19.9	24.3	24.6
Hot food/takeaways	4	10.0	11.3	15.0	11.4
Pubs/bars	4	10.0	13.8	11.9	22.0
Banks/other financial services	2	5.0	1.8	7.9	11.3
Betting shops/casinos/amusement	1	2.5	4.3	3.7	6.7
Estate agents/valuers	7	17.5	17.9	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	14	35.0	30.9	26.5	15.5
Launderettes/dry cleaners	0	0.0	0.0	1.6	1.1
Sub-total	**40**	**100.0**	**100.0**	**100.0**	**100.0**
Other	8				
Total	**48**				

Source: Experian Goad for Princes Risborough (October 2021).

Table PR6 - Non-retail services - satisfaction v dissatisfaction in Princes Risborough (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	10.6	-7.7	2.9	11.0
Pubs / bars	2.2	-2.0	0.1	0.1
Financial services	0.8	-4.1	-3.3	-1.4
Other services	1.3	-0.6	0.8	1.0
Leisure facilities	3.1	-2.3	0.8	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

17.14 When compared with the Buckinghamshire average, Princes Risborough has higher levels of net dissatisfaction with financial services, but higher levels of satisfaction with leisure facilities.

Catchment area

17.15 The household survey results indicate 15% of respondents across the study area had visited shops, services or leisure facilities at Princes Risborough town centre in the last six months, the sixth lowest percentage for the 14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was only 0.7%. The retail capacity analysis suggests Princes Risborough attracts 1.1% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from only two zones in the central and west part of the study area.

17.16 The combined base year turnover of Princes Risborough is estimated to be £80 million, the fifth lowest turnover in Buckinghamshire. This turnover is split £46 million for convenience retail goods, £22 million for comparison retail goods and £12 million for food/beverage.

17.17 Princes Risborough has a relatively small, localised catchment area.

Rental levels

17.18 According to the VOA, Princes Risborough has the =3rd lowest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £330 per sq.m, significantly below the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are relatively weak and occupier demand is below average when compared with the supply of premises. Zone A rents range from £200 to £330 per sq.m in the prime pitch on the central section of the High Street.

Accessibility

17.19 Princes Risborough Railway Station is about a kilometre to the southwest of the town centre. Monks Risborough Railway Station is a similar distance to the north. Bus stops are distributed around the town centre on Bell Street, Church Street, High Street, Market Square and New Road.

17.20 Princes Risborough town centre has two public car parks with 214 spaces (4 disabled). Short stay charges are £0.80 up to one hour or £1.10 up to three hours. Short stay car parking is relatively cheap when compared with most other centres in Buckinghamshire.

The Tesco store has 120 car parking spaces. Car parks are accessible to the main shopping area.

17.21 Of the household survey respondents who had visited Princes Risborough in the last six months, the proximity of the centre to home, work or friends/relatives were important attributes visitors mentioned when compared with other centres in Buckinghamshire. A similar proportion of visitors mentioned proximity to home (19.9% compared with the Buckinghamshire average of 20.7%), work (4.2% compared with 4.1%) and friends/relations (5.0% compared with 5.7%).

17.22 These survey respondents were asked what they like about Princes Risborough town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table PR7.

Table.PR7 - Levels of accessibility - satisfaction v dissatisfaction in Princes Risborough (% of respondents visting centre)

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Car accessibility/traffic congestion	0.3	-2.3	-2.0	-2.9
Disabled access	0.6	-1.2	-0.6	-0.1
Bus services	1.3	-1.2	0.1	-0.8
Train services	0	0	0	0.5
Car parking - amount	5.9	-6.7	-0.8	-5.8
Car parking - cost	3.3	-3.6	-0.3	-7.6
Pedestrianised/traffic free areas	2.2	-1.3	0.9	1.2
Centre layout	4.5	0	4.5	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

17.23 When compared with the Buckinghamshire average, Princes Risborough has higher levels of net dissatisfaction only with disabled access. There appear to be higher levels of net satisfaction with bus services and the layout of the centre.

Environment and ambience

17.24 Princes Risborough is a clean and well maintained centre. The centre features a large proportion of independent retailers and benefits from bunting along the storefronts as well as a small market that was operating at the time. Accessibility is somewhat restricted to the north of the centre due to narrow pavements along Duke Street which widen south of market square, providing a more pleasant walking environment.

17.25 Of the household survey respondents who had visited Princes Risborough in the last six months, slightly lower proportions of visitors indicated they like the centre's historic character/heritage (2.9% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (5.8% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table PR8.

17.26 When compared with the Buckinghamshire average, Princes Risborough has higher levels of net satisfaction with the centre's atmosphere/friendliness than the Buckinghamshire average. Overall Princes Risborough is rated as average by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Table PR8 - Environment and ambience - satisfaction v dissatisfaction in Princes Risborough (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	16.5	-0.2	16.3	16.7
Street cleanliness/maintenance	4.4	-2.0	2.4	3.2
Atmosphere/friendliness	10.5	0.0	10.5	6.0
Undercover shopping	1.4	0.0	1.4	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Occurrence of crime

17.27 UK Crime Stats indicate there were 644 crimes reported in Princes Risborough in the year to November 2022, indicating a crime rate of 79.5 crimes per 1,000 people. This is slightly lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Princes Risborough had the 5th highest rate of crime of the 12 towns assessed in this study.

17.28 Of the household survey respondents who had visited Princes Risborough in the last six months, only 0.2% mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- Despite being a linear the centre is relatively compact and easy to navigate. The Market Square is an attractive feature of the centre and enhances its overall environmental quality.
- The centre benefits from both a Tesco supermarket and a Marks & Spencer Simply Food to provide for both main and top up food shopping.
- There is a relatively good provision of comparison shops and professional services for a centre of its size. The provision of hairdressers/beauty parlours and estate agents is strong.
- The centre has a relatively low shop vacancy rate, below the Buckinghamshire and UK averages, which suggests operator demand is broadly in line with the supply of premises.

- Princes Risborough has higher levels of satisfaction with high street multiples, independent/specialist shops, the street market and supermarkets than the Buckinghamshire average.
- Princes Risborough has higher levels of satisfaction with leisure facilities.
- Princes Risborough has higher levels of visitor satisfaction with bus services and the layout of the centre than the Buckinghamshire average.

Weaknesses

- The centre has a small, localised catchment area, which falls within the sub-regional catchment areas of High Wycombe and Aylesbury.
- Shop units are primarily period buildings that are narrow and limited in size.
- There is an under-provision of restaurants/cafes and takeaways.
- Princes Risborough has higher levels of net dissatisfaction with non-food shops, clothing shops and quality of shops when compared with the Buckinghamshire average.
- Princes Risborough has higher levels of net dissatisfaction with financial services.
- The shop unit sizes are primarily narrow and limited in size due to the historic nature of the centre. This limits the possibility for larger format stores.
- Princes Risborough has higher levels of visitor dissatisfaction with disabled access than the Buckinghamshire average.

Opportunities

- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- The expansion of the Princes Risborough settlement should help to increase footfall and trade in the town centre.
- There is an opportunity to strengthen the evening/night-time economy.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.
- The historic character of the town centre could restrict future development proposals.

Future priorities

Table PR9 Princes Risborough Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	High
Retail Offer Retailer offer; retailer representation	Medium
Vision & Strategy Leadership; Collaboration; Area development strategies	Medium
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Low
Appearance Visual appearance; cleanliness; ground floor frontages	Low
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	Medium
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Low
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	Medium
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Medium
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	Medium
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	Medium
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Medium
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

Appendix 18 Wendover health check

Wendover

Introduction

18.1 Wendover is designated as a *'Town Centre'* within the Vale of Aylesbury Adopted Local Plan (September 2021). The Adopted Local Plan and Neighbourhood Plan identify a relatively tightly drawn town centre boundary, as shown in Figure WE. Wendover is a small compact centre. The centre boundary includes all commercial units along the High Street and Tring Road, but units on Aylesbury Road, Back Street and Pound Street are excluded.

Figure WE - Wendover Town Centre Boundary

Source: Vale of Aylesbury Adopted Local Plan (September 2021) Proposals Map.

Mix of uses

18.2 Wendover has 61 shop and services units (excluding office and leisure/community uses) within the Experian Goad plan boundaries. The total ground floor area of these units totals 6,330 sq.m gross, an average of 104 sq.m gross per unit. Wendover is the third smallest of the 14 main town centres in Buckinghamshire, only larger than Great Missenden and Winslow. There is a street market on Thursdays. The diversity of uses within the centre is set out in Table WE1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table WE1 - Mix of shops/service units in Wendover Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	6	9.8	7.4	9.8
Comparison goods retail	19	31.1	31.2	28.8
Financial/professional services	8	13.1	9.4	8.9
Restaurants/Cafés	6	9.8	10.6	10.2
Pubs/Bars	5	8.2	4.4	5.0
Hot food takeaways	1	1.6	5.0	6.3
Other non-retail services	14	23.0	19.5	16.6
Vacant	2	3.3	12.6	14.4
Total	**61**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Wendover town centre (January 2022).

18.3 The centre's mix of units is broadly in line with the Buckinghamshire and UK averages, although it has higher proportions of financial/professional services, pubs/bars and non-retail services. There is an under-representation of hot food takeaways. Wendover has a low vacancy rate, significantly below the Buckinghamshire and UK averages. More recent (quarter 1 - 2023) information collected by the Council's Economic Growth and Regeneration department suggests there was only one vacant unit.

Table WE2 - Mix of shops/service floorspace in Wendover Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	1,040	16.4	17.7
Comparison goods retail	1,880	29.7	33.9
Financial/professional services	460	7.3	7.3
Restaurants/Cafés	560	8.8	7.2
Pubs/Bars	1,050	16.6	6.5
Hot food takeaways	160	2.5	3.4
Other non-retail services	940	14.8	8.6
Vacant	240	3.8	15.4
Total	**6,330**	**100.0**	**100.0**

Source: Experian Goad for Wendover town centre (January 2022).

18.4 Budgens is the main food store but is not ideal for main and bulk food shopping. There is a small selection of independent specialists including bakers, butcher and off-licence.

Retailer representation

18.5 Wendover has a small selection of comparison shops (19), with four Goad categories not represented in the centre. The choice of outlets in other represented categories is limited. Excluding charity shops, Lloyd's Pharmacy and WH Smiths are the only national multiple comparison goods retailers. Overall, Wendover has a relatively limited range and choice of comparison goods shops.

Table WE3 - Mix of comparison goods stores in Wendover Town Centre

Type of Unit	**Unit (No.)**	**Unit (%)**	**Floorspace (%)**	**UK unit ave. (%)**	**UK space ave. (%)**
Clothing and footwear	4	21.1	28.7	21.1	24.2
Furniture, carpets and textiles	2	10.5	12.2	7.6	7.9
Books, arts, cards and stationers	1	5.3	1.6	6.2	4.1
Electrical, music and photography	1	5.3	1.6	9.4	5.0
DIY, hardware and homeware	2	10.5	5.9	7.0	13.0
China, glass and gifts	1	5.3	4.8	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	2	10.5	18.1	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	2	10.5	9.6	2.3	0.9
Toys, hobby, cycle and sports	0	0.0	0.0	5.4	5.8
Jewellers	1	5.3	4.8	5.1	2.2
Charity and second-hand shops	3	15.8	12.8	9.8	6.6
Other comparison goods retailers	0	0.0	0.0	5.5	3.2
Total	**19**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad for Wendover town centre (January 2022).

18.6 The household survey respondents were asked what they like about Wendover and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table WE4.

Table WE4 - Shopping provision - satisfaction v dissatisfaction in Wendover (% of respondents visiting centre

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Non-food shops	7.4	-3.2	4.2	1.1
Food shops (bakers/butchers/grocers)	2.6	-1.4	1.2	-2.4
Clothing shops	1.3	-1.2	0.1	-5.1
Quality of shops	1.8	-1.2	0.5	0.2
High street multiples	1.3	-2.8	-1.5	-2.2
Independent/specialist shops	24.7	-3.7	21.0	3.7
Affordability of shops	1.7	-4.7	-3.1	-3.3
Street market	4.8	-1.3	3.5	1.3
Supermarkets	2.8	-5.0	-2.1	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

18.7 When compared with the Buckinghamshire average, Wendover has higher levels of net dissatisfaction with supermarkets. There are higher level of satisfaction with non-food shops, food shops, quality of shops, independent/specialist shops and the street market.

Non-retail services

18.8 Wendover has a reasonable service sector (comprising 34 units in total) for a centre of its size, but there are no financial services, betting shops and travel agents. There is a relatively good provision of pubs/bars, estate agents and hairdressers/beauty parlours. Other non-retail and community facilities include a dentist and council offices.

18.9 The household survey results also show conflicting views in relation to non-retail, as shown in Table WE6.

Table WE5 - Mix of service uses in Wendover Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	6	20.7	35.3	24.3	24.6
Hot food/takeaways	1	3.4	2.8	15.0	11.4
Pubs/bars	5	17.2	25.0	11.9	22.0
Banks/other financial services	0	0.0	9.3	7.9	11.3
Betting shops/casinos/amusement	0	0.0	0.8	3.7	6.7
Estate agents/valuers	6	20.7	10.3	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	10	34.5	15.9	26.5	15.5
Launderettes/dry cleaners	1	3.4	0.7	1.6	1.1
Sub-total	**29**	**100.0**	**100.0**	**100.0**	**100.0**
Other	5				
Total	**34**				

Source: Experian Goad for Wendover town centre (January 2022).

Table WE6 - Non-retail services - satisfaction v dissatisfaction in Wendover (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	20.9	-2.5	18.4	11.0
Pubs / bars	2.2	-2.4	-0.2	0.1
Financial services	0.0	-1.4	-1.4	-1.4
Other services	2.0	-1.1	0.9	1.0
Leisure facilities	1.5	-2.4	-0.9	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

18.10 When compared with the Buckinghamshire average, Wendover has higher levels of net dissatisfaction with pubs/bars and leisure facilities, but higher levels of satisfaction with cafés/restaurants.

Catchment area

18.11 Wendover has a relatively small, localised catchment area . The household survey results indicate 14% of respondents across the study area had visited shops, services or leisure facilities at Wendover town centre in the last six months, the third lowest percentage for the

14 assessed main centres in Buckinghamshire. The proportion of respondents who do most of their non-food shopping was only 0.1%. The retail capacity analysis suggests Wendover attracts only 0.2% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from only two zones in the study area.

18.12 The combined base year turnover of Wendover is estimated to be £31 million, the second lowest turnover in Buckinghamshire. Wendover's turnover is split £13 million for convenience retail goods, £5 million for comparison retail goods and £13 million for food/beverage.

Rental levels

18.13 According to the VOA, Wendover has the 2nd lowest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £320 per sq.m, significantly below the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are consistent with Wendover's position in the retail hierarchy and indicate occupier demand is below average. Zone A rents range from £260 to £320 per sq.m in the prime pitch on the High Street.

Accessibility

18.14 Wendover Railway Station is about 200-metres to the west of the town centre. Bus stops are available on Aylesbury Road. Wendover town centre has one public car park with 71 spaces (4 disabled). Short stay charges are free up to one hour or £0.80 up to three hours. Short stay car parking is relatively cheap when compared with other centres in Buckinghamshire. The Budgens store has 30 car parking spaces. Car parks are accessible to the main shopping area.

18.15 Of the household survey respondents who had visited Wendover in the last six months, the proximity of the centre to home, work or friends/relatives were less important attributes visitors mentioned when compared with other centres in Buckinghamshire. A lower proportion of visitors mentioned proximity to home (9.3% compared with the Buckinghamshire average of 20.7%), work (3.2% compared with 4.1%) and friends/relations (4.0% compared with 5.7%).

18.16 These survey respondents were asked what they like about Wendover town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table WE7.

18.17 When compared with the Buckinghamshire average, Wendover has higher levels of net dissatisfaction with disabled access, train services and the amount of car parking. The other factors are similar to the Buckinghamshire average.

Table WE7 - Levels of accessibility - satisfaction v dissatisfaction in Wendover (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-2.1	-2.1	-2.9
Disabled access	0	-0.5	-0.5	-0.1
Bus services	0	-0.6	-0.6	-0.8
Train services	1.8	-2.4	-0.6	0.5
Car parking - amount	5.7	-15.4	-9.7	-5.8
Car parking - cost	3.3	-6.1	-2.8	-7.6
Pedestrianised/traffic free areas	1.6	-1.3	0.3	1.2
Centre layout	1.4	0	1.4	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

Environment and ambience

18.18 Wendover is an attractive and compact village centre. It has spaces for outdoor dining but pavements are narrow in sections along the high street. Pavements are uneven in places and the streetscape is relatively poor in Back Street. Street furniture could be upgraded.

18.19 Of the household survey respondents who had visited Wendover in the last six months, slightly higher proportions of visitors indicated they like the centre's historic character/heritage (4.4% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (9.1% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were conflicting views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table WE8.

Table WE8 - Environment and ambience - satisfaction v dissatisfaction in Wendover (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Environment	26.7	-2.0	24.7	16.7
Street cleanliness/maintenance	3.7	-0.4	3.3	3.2
Atmosphere/friendliness	10.2	0.0	10.2	6.0
Undercover shopping	0.00	-0.7	-0.7	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

18.20 When compared with the Buckinghamshire average, Wendover has higher levels of net satisfaction with the environment, street cleanliness/maintenance and atmosphere.

Occurrence of crime

18.21 UK Crime Stats indicate there were 398 crimes reported in Wendover in the year to November 2022, indicating a crime rate of 54.3 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. The town has the 3rd lowest rate of crime of the 14 towns assessed in this study. Of the household survey respondents who had visited Wendover in the last six months, 1.4%

mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- There is a good provision of pubs/bars and non-retail services, including estate agents and beauty parlours.
- The centre has a very low shop vacancy rate, significantly below the Buckinghamshire and UK averages, which suggests operator demand is above the supply of premises.
- Wendover has higher levels of satisfaction with non-food shops, food shops, quality of shops, independent/specialist shops and the street market than the Buckinghamshire average.
- Wendover has higher levels of satisfaction with cafés/restaurants.
- The town has the 3rd lowest crime rate in Buckinghamshire.
- Wendover is related above average by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Weaknesses

- Wendover is the third smallest centre in Buckinghamshire with a limited number of shops. The range and choice of comparison goods shops is limited.
- The centre has a small, localised catchment area, which falls within the sub-regional catchment area of Aylesbury.
- The main food store is too small for main and bulk food shopping.
- There is a limited range and choice of comparison goods shops.
- Shop units are primarily period buildings that are narrow and limited in size.
- Wendover has higher levels of net dissatisfaction with supermarkets when compared with the Buckinghamshire average.
- Wendover has higher levels of net dissatisfaction with pubs/bars and leisure facilities.
- Wendover has higher levels of visitor dissatisfaction with disabled access, train services and the amount of car parking than the Buckinghamshire average.

Opportunities

- There is potential to increase the use of wide pavements and open space and upgrade street furniture to provide a more attractive environment for visitors.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.
- There is an opportunity to build-on and further strengthen the evening/night-time economy.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.
- The historic character of the town centre could restrict future development proposals.

Future priorities

Table WE9 Wendover Town Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	High
Retail Offer Retailer offer; retailer representation	High
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Low
Appearance Visual appearance; cleanliness; ground floor frontages	Low
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	High
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Medium
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	High
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Low
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	Medium
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	High
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	High
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

Appendix 19 Winslow health check

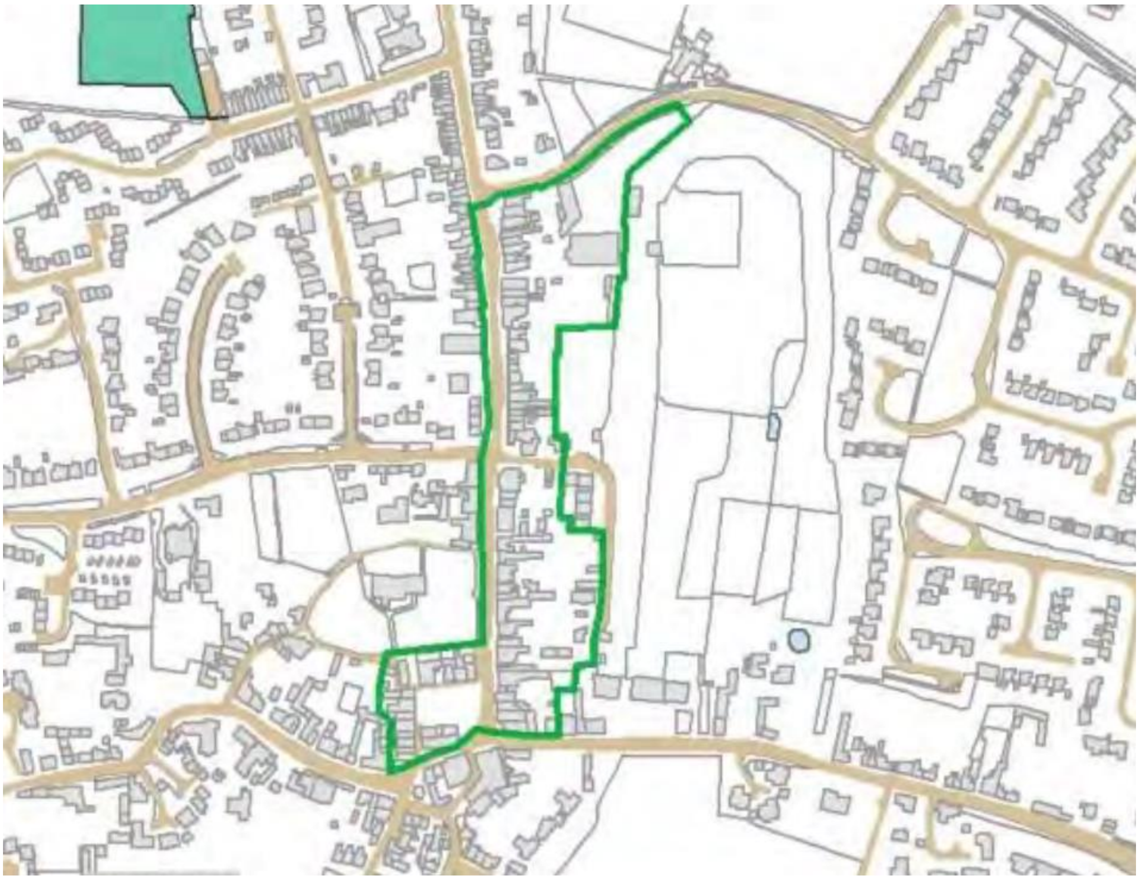
Winslow

Introduction

19.1 Winslow is designated as a *'Town Centre'* within the Vale of Aylesbury Adopted Local Plan (September 2021). It is described as a small historic market town located approximately nine miles north of Aylesbury.

19.2 The Adopted Local Plan and Neighbourhood Plan identify a relatively tightly drawn town centre boundary, as shown in Figure WN. The centre is linear stretching 600 metres north to south along the High Street.

Figure WN - Winslow Town Centre Boundary



Source: Vale of Aylesbury Adopted Local Plan (September 2021) Proposals Map.

Mix of uses

19.3 Winslow Town centre has 56 shop and services units (excluding office and leisure/community uses). The total ground floor area of these units totals 3,249 sq.m gross, an average of 58 sq.m gross per unit. Winslow is the smallest of the 14 main centres in Buckinghamshire. There is a street market on Wednesdays. The diversity of uses within the centre is set out in Table WN1, compared with the average across Buckinghamshire and the Goad Plan national average.

Table WN1 - Mix of shops/service units in Winslow Town Centre

Type of Unit	Units (Number)	Units (%)	Bucks units average (%)	UK unit average (%)
Convenience goods retail	3	5.4	7.4	9.8
Comparison goods retail	16	28.6	31.2	28.8
Financial/professional services	5	8.9	9.4	8.9
Restaurants/Cafés	6	10.7	10.6	10.2
Pubs/Bars	3	5.4	4.4	5.0
Hot food takeaways	5	8.9	5.0	6.3
Other non-retail services	14	25.0	19.5	16.6
Vacant	4	7.1	12.6	14.4
Total	**56**	**100.0**	**100.0**	**100.0**

Source: Lichfields' survey for Winslow (April 2023).

19.4 The centre's mix of units is broadly in line with the Buckinghamshire and UK averages, although it has higher proportions of hot food takeaways and other non-retail services. There is an under-representation of convenience goods retail. Winslow has a relatively low vacancy rate, significantly below the Buckinghamshire and UK averages. Quarter 1 – 2023 information collected by the Council's Economic Growth and Regeneration department recorded five vacant units.

Table WN2 - Mix of shops/service floorspace in Winslow Town Centre

Type of Floorspace	Floorspace (sq.m)	Floorspace (%)	UK floorspace average (%)
Convenience goods retail	440	13.5	17.7
Comparison goods retail	845	26.0	33.9
Financial/professional services	232	7.1	7.3
Restaurants/Cafés	282	8.7	7.2
Pubs/Bars	233	7.2	6.5
Hot food takeaways	177	5.4	3.4
Other non-retail services	754	23.2	8.6
Vacant	286	8.8	15.4
Total	**3,249**	**100.0**	**100.0**

Source: Lichfields' survey for Winslow (April 2023).

19.5 Co-op and One Stop are the main food stores, but these small stores are not ideal for main and bulk food shopping. There is a butcher.

Retailer representation

19.6 Winslow has a small selection of comparison shops (16), with three Goad categories not represented in the centre. The choice of outlets in other represented categories is limited. Comparison goods shops are small independent traders rather than national multiple. Overall, Winslow has a relatively limited range and choice of comparison goods shops.

Table WN3 - Mix of comparison goods stores in Winslow Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Clothing and footwear	1	6.3	5.4	21.1	24.2
Furniture, carpets and textiles	2	12.5	21.9	7.6	7.9
Books, arts, cards and stationers	1	6.3	12.1	6.2	4.1
Electrical, music and photography	0	0.0	0.0	9.4	5.0
DIY, hardware and homeware	1	6.3	14.6	7.0	13.0
China, glass and gifts	1	6.3	3.8	5.6	2.6
Cars, motorcycles and accessories	0	0.0	0.0	1.3	2.1
Chemists, drug stores and opticians	2	12.5	13.5	12.0	10.4
Variety, department and catalogue	0	0.0	0.0	1.6	12.2
Florists, nurserymen and seedsmen	3	18.8	6.0	2.3	0.9
Toys, hobby, cycle and sports	0	0.0	0.0	5.4	5.8
Jewellers	1	6.3	1.7	5.1	2.2
Charity and second-hand shops	2	12.5	16.6	9.8	6.6
Other comparison goods retailers	2	12.5	4.5	5.5	3.2
Total	**16**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Lichfields' survey for Winslow (April 2023).

19.7 The household survey respondents were asked what they like about Winslow and what improvement would make them visit more often. Many respondents mentioned factors relating to the provision of shops and services. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table WN4.

Table WN4 - Shopping provision - satisfaction v dissatisfaction in Winslow (% of respondents visiting centre

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Non-food shops	1.2	-2.6	-1.4	1.1
Food shops (bakers/butchers/grocers)	2.7	-4.5	-1.9	-2.4
Clothing shops	0.3	-4.7	-4.3	-5.1
Quality of shops	2.7	0.0	2.7	0.2
High street multiples	4.7	-1.4	3.3	-2.2
Independent/specialist shops	3.1	-8.4	-5.3	3.7
Affordability of shops	0.0	-4.1	-4.1	-3.3
Street market	7.3	-1.2	6.1	1.3
Supermarkets	0.8	-6.6	-5.8	0.8

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

19.8 When compared with the Buckinghamshire average, Winslow has higher levels of net dissatisfaction with non-food shops, independent/specialist shops, affordability and supermarkets. However there are higher levels of satisfaction with the quality of shops, high street multiples and the street market.

Non-retail services

19.9 Winslow has a reasonable service sector (comprising 33 units in total) for a centre of its size, but there are no betting shops and travel agents. There is a relatively good provision of hot food takeaways and hairdressers/beauty parlours.

Table WN5 - Mix of service uses in Winslow Town Centre

Type of Unit	Unit (No.)	Unit (%)	Floorspace (%)	UK unit ave. (%)	UK space ave. (%)
Restaurants/cafés	6	20.7	22.7	24.3	24.6
Hot food/takeaways	5	17.2	14.3	15.0	11.4
Pubs/bars	3	10.3	18.8	11.9	22.0
Banks/other financial services	2	6.9	3.7	7.9	11.3
Betting shops/casinos/amusement	0	0.0	0.0	3.7	6.7
Estate agents/valuers	2	6.9	9.7	7.7	6.2
Travel agents	0	0.0	0.0	1.4	1.1
Hairdressers/beauty parlours	10	34.5	26.0	26.5	15.5
Launderettes/dry cleaners	1	3.4	4.8	1.6	1.1
Sub-total	**29**	**100.0**	**100.0**	**100.0**	**100.0**
Other	4				
Total	**33**				

Source: Lichfields' survey for Winslow (April 2023).

19.10 Other non-retail and community facilities include a neighbourhood police office, dentist, vet, town council office and a gallery. The household survey results also show conflicting views in relation to non-retail, as shown in Table WN6.

Table WN6 - Non-retail services - satisfaction v dissatisfaction in Winslow (% of respondents visiting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Cafés / restaurants	17.9	-8.3	9.5	11.0
Pubs / bars	1.0	-3.5	-2.5	0.1
Financial services	0.6	-7.6	-7.1	-1.4
Other services	2.6	-3.0	-0.4	1.0
Leisure facilities	0.8	0.0	0.8	0.1

Source: NEMS household survey results (February 2023).
1) % saying factor is liked. 2) % saying factor should be improved.

19.11 When compared with the Buckinghamshire average, Winslow has higher levels of net dissatisfaction with pubs/bars, financial services and other services, but higher levels of satisfaction with leisure facilities.

Catchment area

19.12 Winslow has a small, localised catchment area. The household survey results indicate 6% of respondents across the study area had visited shops, services or leisure facilities at Winslow town centre in the last six months, the lowest percentage for the 14 assessed main centres in Buckinghamshire. No respondents do most of their non-food shopping in Winslow. The retail capacity analysis suggests Winslow attracts less than 0.1% of comparison goods expenditure within the study area, with a reasonable level of trade drawn from only the local zone in the study area. The combined base year turnover of Winslow is estimated to be £26 million, the lowest turnover in Buckinghamshire. Winslow's turnover is split £13 million for convenience retail goods, £2 million for comparison retail goods and £11 million for food/beverage.

Rental levels

19.13 According to the VOA, Winslow has the lowest prime Zone A retail rents of the 14 centres assessed in Buckinghamshire. The prime Zone A retail rent is £230 per sq.m, less than half the average of £511 per sq.m for the 14 Buckinghamshire town centres assessed. These figures suggest rental levels are consistent with Winslow's position in the retail hierarchy and indicate occupier demand is below average. Zone A rents range from £105 to £230 per sq.m in the prime pitch on the High Street.

Accessibility

19.14 Winslow currently has no railway services. Bus stops are available on Sheep Street and the High Street. Winslow has two public car parks with 88 spaces (6 disabled). The main Greyhound Lane car park (72 spaces) is free and the Market Square car park is free up to 1 hour. Both car parks are accessible close to the main shopping area.

19.15 Of the household survey respondents who had visited Winslow in the last six months, the proximity of the centre to home and friends/relatives were important attributes visitors mentioned when compared with other centres in Buckinghamshire. A higher proportion of visitors mentioned proximity to home (27.9% compared with the Buckinghamshire average of 20.7%) and friends/relations (8.5% compared with 5.7%), but work was less important (1.0% compared with 4.1%).

19.16 These survey respondents were asked what they like about Winslow town centre and what improvement would make them visit more often. Many respondents mentioned factors relating to accessibility to the centre and movement around the centre. Conflicting views were expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table WN7.

Table WN7 - Levels of accessibility - satisfaction v dissatisfaction in Winslow (% of respondents visting centre)

Factor	% satisfied (1)	% dissatisfied (2)	% difference (net)	Net % Bucks average
Car accessibility/traffic congestion	0	-2.9	-2.9	-2.9
Disabled access	0.4	-2.2	-1.8	-0.1
Bus services	1.0	-2.9	-1. 9	-0.8
Train services	0	-2.6	-2.6	0.5
Car parking - amount	6.0	-16.6	-10.6	-5.8
Car parking - cost	3.5	-3.9	-0.4	-7.6
Pedestrianised/traffic free areas	5.2	0	5.4	1.2
Centre layout	6.4	0	6.4	3.7

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

19.17 When compared with the Buckinghamshire average, Winslow has higher levels of net dissatisfaction with disabled access, train services and the amount of car parking. There appear to be higher levels of net satisfaction with the cost of car parking, pedestrianised/traffic free areas and the layout of the centre.

Environment and ambience

19.18 Winslow is a reasonably attract village centre with many period buildings. Pedestrian flows and activity were low at the time of Lichfields' weekday daytime visit. The market square is a focal point but the streetscape and environment in this area could be improved. Pavements are narrow in places and uneven and street furniture and landscaping is limited. Traffic flows along the main high street were moderate.

19.19 Of the household survey respondents who had visited Winslow in the last six months, slightly lower proportions of visitors indicated they like the centre's historic character/heritage (3.1% compared with the Buckinghamshire average of 3.3%) and traditional quaintness (2.7% compared with 6.7%). In terms of other factors either liked by respondents or where improvements were suggested, there were mixed views expressed but the levels of satisfaction (factors liked by respondents) and dissatisfaction (factors where improvements were suggested) have been compared to provide a net satisfaction or dissatisfaction figure, as shown in Table WN8.

Table WN8 - Environment and ambience - satisfaction v dissatisfaction in Winslow (% of respondents visting centre)

Factor	**% satisfied (1)**	**% dissatisfied (2)**	**% difference (net)**	**Net % Bucks average**
Environment	11.1	-0.3	10.7	16.7
Street cleanliness/maintenance	4.7	0.0	4.7	3.2
Atmosphere/friendliness	8.6	0.0	8.6	6.0
Undercover shopping	0.0	0.0	0.0	0.1

Source: NEMS household survey results (February 2023)
1) % saying factor is liked 2) % saying factor should be improved

19.20 When compared with the Buckinghamshire average, Winslow has higher levels of net satisfaction with street cleanliness/maintenance and atmosphere. Overall Winslow is rated as average by visitors in terms of environment and ambience when compared with other centres in Buckinghamshire.

Occurrence of crime

19.21 UK Crime Stats indicate there were 289 crimes reported in Winslow in the year to November 2022, indicating a crime rate of 65.5 crimes per 1,000 people. This is much lower than the Buckinghamshire crime rate of 98.2 crimes per 1,000 people over the same period. Winslow had the 6th lowest rate of crime of the 14 towns assessed in this study. Of the household survey respondents who had visited Winslow in the last six months, none mentioned more security or better personal safety as a required improvement that would make them visit more often.

SWOT analysis

Strengths

- The centre has a good provision of non-retail services for a centre of its size, particularly takeaways and hair/beauty outlets.
- The vacancy rate is below the Buckinghamshire and UK averages, which suggests operator demand is above the supply of premises.
- Winslow has higher levels of satisfaction with the quality of shops, high street multiples and the street market than the Buckinghamshire average.
- The town has the 6th lowest crime rate in Buckinghamshire and a good perception of security and safety.
- Winslow has higher levels of visitor satisfaction with the cost of car parking, pedestrianised/traffic free areas and the layout of the centre than the Buckinghamshire average.
- Free short-stay car parking is available.
- The town has a relatively low crime rate.

Weaknesses

- Winslow is the smallest centre in Buckinghamshire with a limited number of shops. The range and choice of comparison goods shops is limited.
- The centre has a small, localised catchment area, which falls within the sub-regional catchment area of Milton Keynes.
- There is an under-provision of convenience goods retail provision and the small food stores are not suitable for main and bulk food and grocery shopping.
- The layout of the centre is linear with breaks in the commercial frontages, which is not an ideal natural circuit for pedestrians.
- Shop units are primarily period buildings that are narrow and limited in size.
- Winslow has higher levels of net dissatisfaction with non-food shops, independent/specialist shops, affordability and supermarkets when compared with the Buckinghamshire average.
- Retail rents are the lowest of the centres in Buckinghamshire.
- Winslow has higher levels of net dissatisfaction with pubs/bars, financial services and other services.
- Winslow has higher levels of visitor dissatisfaction with disabled access, train services and the amount of car parking than the Buckinghamshire average.

Opportunities

- The market square is a focal point that provides opportunities for environmental improvements and more activities.

- There is potential to improve landscaping, pavements and street furniture around the centre.
- Increased home working since the pandemic has increased the importance of local shops and services in smaller centres. The continuation of this trend should help to boost trade in the centre.

Threats

- The limited number of vacant shop units suggest the opportunities for new operators and investment are limited.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.

Future priorities

Table WN9 Winslow Centre Priorities - identified adopting the Institute of Place Management's 25 vital and viable factors, informed by the health check and SWOT analysis. 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.

Factors	Priority
Activity Opening hours; footfall; shopping hours; evening economy	High
Retail Offer Retailer offer; retailer representation	High
Vision & Strategy Leadership; Collaboration; Area development strategies	Low
Experience Centre image; service quality; visitor satisfaction; familiarity; atmosphere	Medium
Appearance Visual appearance; cleanliness; ground floor frontages	Medium
Place Management Centre management; Shopping Centre Management; Town Centre Management (TCM); BIDs	Medium
Necessities Car-parking; Amenities; General Facilities	High
Anchors Single factor: Presence of anchors that give locations their basic character and signify importance	Medium
Non-Retail Offer Attractions; entertainment; non-retail offer; leisure offer	Medium
Merchandise Range/quality of goods; assortments; merchandising	High
Walking Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity	Medium
Place Marketing Centre marketing; marketing; orientation/flow	Medium
Networks & Partnerships with Council Networking; partnerships; community leadership; retail tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement	Medium
Accessibility Accessibility; convenience; public transport	High
Diversity Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice	High
Attractiveness Sales/turnover; place vacancy rates; attractiveness; retail spend; customer/catchment views	Medium
Markets Traditional markets; street trading	Low
Recreational Space Recreational areas; public space; open space	Low
Barriers to New Entrants Barriers to entry; vacant units/rents, landlords	High
Safety / Crime A centre KPI measuring perceptions or actual crime including shoplifting	Low
Adaptability Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design	High
Liveable Multi/mono-functional; liveability; personal services; mixed use	Medium
Redevelopment Plans Planning Blight; Regeneration	Low
Functionality The degree to which a centre fulfils a role (e.g. employment, residential, entertainment, tourism, etc.)	Medium
Innovation Opportunities to experiment; retail innovation	Medium

Appendix 20 Stakeholder workshop

Discussion questions

How can we improve viability/quality of the town centres?

- Good accessibility and mobility within town centres is important, including disabled access.
- Town centre's car parking offer needs to be future proof e.g. increase in electric vehicle charging facilities is required.
- Environmental improvements are required. There is increased demand for outdoor dining in public areas.
- The future strategy should identify opportunities to create unique town centres with specialist quarters e.g. cultural centres and higher quality places.
- There was a perception that car use to visit town centres is going down.
- The hospitality sector is being constrained by low labour supply.
- A future vision for town centres is required focusing on accessible, clean and safe town centres.
- There is a view that more people are travelling outside Buckinghamshire to shop, because local people are avoiding town centres due to the poor perceptions.
- Leisure - people are travelling to out of town offer rather than town centre.
- Recent growing trend in physical rather than on-line purchases.

Should Buckinghamshire seek to maintain, improve or reduce its retail/leisure market share and what should be the distribution of the future development (dispersal or concentration)?

- Projections in plan should promote growth and protect the loss/change of use of commercial floorspace to housing.
- There was a consensus that Buckinghamshire should seek to maintain if not enhance its retail/leisure market share and future investment should be encouraged in town centres.
- The strategy needs to consider what is happening in the wider area and identify where trade is being lost to.
- Opportunities in the North of Buckinghamshire are not always in the main town, but development in rural locations is often unsuitable.
- There should be more allocations in the South and along the transport corridors i.e. M40 and EWR.

Should we seek to retain predominant retail use or more diversification?

- There is a need for diversification and more locally distinctive centres.
- Smaller town centres could help support flexible/hybrid work locations/spaces.
- Growth in fast fashion retail in town centre is declining and alternative uses will need to be attracted.
- More growth in the independent sector rather than national multiple is required. There is a need for more start-up opportunities which will help to grow the overall town centre offer.
- Upper floors in the high street have potential for new uses and not just for housing.
- Opportunities for pop up/start-ups should be explored. These opportunities will not require big commitments.
- Mixed use should be considered on large employment sites. This could include retail and services to cater for employees.