MILTON KEYNES COUNCIL

THE MILTON KEYNES RETAIL CAPACITY AND LEISURE STUDY

ROGER TYM & PARTNERS
Planners and Development Economists

VOLUME 3 - APPENDICES

Final Report February 2010

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APPENDIX 1

THE BRIEF

MILTON KEYNES COUNCIL: RETAIL CAPACITY AND STRATEGY REVIEW

REVISED TENDER BRIEF

1. Introduction

1.1 In September 2003, consultants CB Richard Ellis (CBRE) undertook a retail capacity study for Milton Keynes on behalf of Milton Keynes Council and Milton Keynes Partnerships. That work forecast retail capacity in Milton Keynes up to 2012 and the major findings of that report are reflected in the Council's replacement Local Plan adopted in December 2005.

1.2 Since that study was prepared in 2003, a significant amount of new retail floorspace has been built, is under construction or has received planning consent. In November 2006, Milton Keynes Partnerships produced a report on retail capacity in Milton Keynes from consultants CB Richard Ellis. Although the Council supplied information to the consultants preparing the report, the Council has not adopted it as a basis for decision-making.

1.3 Among the reasons for the Council's decision was that the survey work for the report was completed before the opening of an Asda and Ikea at Denbigh North and the Council believes that shopping patterns in the Borough are likely to have fundamentally changed since that work was completed. The conclusions of that report have also been criticised by other consultancy firms for overestimating the capacity of Milton Keynes to accommodate new development.

1.4 As the fastest growing local authority area in the UK the Council now requires a fresh study of retail capacity within the Borough to assess what if any additional retail development is required, when it is required and where it should be located. This study will form part of the evidence base for the Council's new Local Development Framework Core Strategy and will enable the Council to develop preferred options for the location of additional retail floorspace, if needed, in the Core Strategy.

1.5 Among the other topics to be considered in your report are the role and function of Central Milton Keynes (CMK) and other centres within the Borough and the development options before the Council. Additionally, you will be required to review town centre boundaries and defined retail frontages currently defined in the adopted Local Plan and examine if the Council's policy of providing a local centre within 500 metres of most new housing is still feasible and the viable size of store which can be supported by available expenditure.

1.6 Among the other reasons why the Council considers this study necessary are:

- Continued interest from retailers and developers in providing additional large food stores and retail warehousing in the Borough.

- The need to determine the scale and level of retail provision required after 2016 in expansion areas outside the current boundaries of the City
- To support the development of Central Milton Keynes as a regional centre and the main retail and service centre of the City.
- The scope for retailing to regenerate older town centres and grid squares

2. Purpose and Method for this Study

2.1 The purpose of this study can be summarised as follows:

a) To critically examine and review the assumptions and findings of the 2006 CBRE and other submissions on the 2006 CBRE report.

b) To produce a model of retail capacity within the Borough taking into account the most recent population and housing growth forecasts, existing retail commitments and proposed new retail developments for Milton Keynes.

c) To undertake a household survey identifying shopping patterns within the Borough and to quantify and assess if there is sufficient retail capacity, in terms of convenience and comparison expenditure, to support additional new retail floorspace in the Borough over the next five and ten years (from the base date of the study e.g. by 2012 and 2017, assuming the base date is 2007). Your report should clearly indicate when sufficient capacity would exist for new floorspace to be developed and where that capacity should be located. Those locations should be identified on an OS Plan. You should also estimate the amount of retail floorspace, in terms of convenience and comparison floorspace, required in Milton Keynes in longer term to 2021 and 2026 based on current population trends and housing completions.

d) To produce a robust retail strategy report for the Borough giving clear recommendations to the Council, if there is or is not additional capacity for retail development within the Borough, over and above existing commitments, within the relevant time periods specified above and where any new retail floorspace should be located. You should identify the best locations for additional retail development taking into account government guidance, and a market perspective on the commercial viability of particular sites.

e) To highlight the role and function of CMK and other centres within the retail hierarchy in the Borough and the development options before the Council. For example, if retail capacity is identified should it all be focused on CMK or can some be steered towards other district and town centres or a combination of both.

f) To ensure that the principle of linking new retail development with the provision of community facilities and other social infrastructure is continued.

g) To review the retail hierarchy, town centre boundaries and defined retail frontages currently identified in the adopted Local Plan. These centres include CMK, Bletchley, Fenny Stratford, Wolverton, Newport Pagnell, Olney, Stony Stratford and Woburn Sands In previous studies the Council has sought advice from local commercial surveyors on the definition of these areas.

h) To examine if the Council's policy of providing a local centre, which can range from a single general convenience store to a group of shops, within 500 metres of most new housing is still feasible and to recommend to the Council the size of store which should be provided.

i) To provide information to the Council on retailers, services and commercial leisure operators seeking representation within the City or to expand their representation here.

j) Any report on retail capacity within the Milton Keynes Council area should take into account:

    (i) Relevant national and regional planning policy e.g.PPS6, the South East Plan and the Milton Keynes &South Midlands Sub–regional Strategy
    (ii) The Milton Keynes 2031 Growth Study
    (iii) Relevant Local Plan Policy
    (iv) The results of various studies and development proposals for Central Milton Keynes (CMK) and other district and town centres within the Borough
    (v) The Council's Local Transport Plan 2

2.2 Your report should pull the above elements together and focus on what additional retail development is required, when it is required and where it should be located. It should comply with relevant national advice and best practise elsewhere on the most sustainable locations for new retail development.

3. Terms of Reference

3.1 Your report should include:

a) Projections of the amount of convenience and comparison floorspace required within the Borough by 2007 and 2012 with an indication of the amount of floorspace required by 2021 and 2026 based on current population trends and housing completions

b) A strategy for accommodating new retail development in the Council's area, including advice on the application of the "sequential approach" in the unique circumstances of Milton Keynes

c) Clear views on the role and potential of CMK and each district/town centre, taking into account development potential, design considerations, traffic / pedestrian movement etc. This should be based on published sources rather than undertaking any new detailed analysis.

d) An assessment of the appropriate level, nature and location of retail provision required serving proposed expansion areas outside the current boundaries of the City.

e) A review of town centre boundaries and defined retail frontages currently identified in the adopted Local Plan.

f) A consideration of if the Council's policy of providing a local centre within 500 metres of most new housing is still feasible and the size of store which can be provided.

g) Details of retailers, services and commercial leisure operators seeking representation within the City or to expand their representation here. This should be from published sources.

4. Milton Keynes Borough

4.1 The Borough of Milton Keynes includes the new city of Milton Keynes and a substantial rural area. In 2006 it had an estimated total population of about 222,350 and is projected to grow to 281,790 by 2017 an increase of about 27%. Around 80% of the Borough's population (186,500) currently live within the city. The main settlements outside the City are Newport Pagnell (15,000) and Olney (6,000).

4.2 In the Sustainable Communities Plan Milton Keynes is identified as one of four major growth areas in the Southeast of England, by 2026, the population of the Borough is expected to have increased to around 326,000.

4.3 Until 1992, Milton Keynes Development Corporation (MKDC) was responsible for the development of the new city, using land assembly and planning powers available under the New Towns Acts. Following the wind up of the Corporation, their assets now rest with English Partnerships the largest landowner within the City.

5. Retailing in Milton Keynes

5.1 The development of Milton Keynes has been unique in terms of the scale, standards and variety of planned new shopping facilities, which have been provided over the last 30 years. Details are included in the adopted Local Plan; in summary:

- The regional shopping centre of Central Milton Keynes (CMK)
- Major new district centres at Kingston and Westcroft anchored by Tesco's at Kingston and Morrison's at Westcroft.
- Additional shopping provision in the older town centres within the City (Bletchley, Stony Stratford, Wolverton, Newport Pagnell, Woburn Sands and Olney)

- More than 30 new local centres, in addition to existing local and village centres, providing convenient shopping facilities close to the homes of local residents.

5.2 There has also been some out-of-centre development in the Watling Street / Saxon Street area of Bletchley, partly as a result of appeal decisions in the late 1980s; this area includes both retail warehousing (Matalan and B&Q) and a large food store (Tesco). Retail warehousing has also been planned and developed in the grid squares of Rooksley and Winterhill, close to CMK. Enabling retail development for a new Football stadium at Denbigh North has also been permitted for an Asda and Ikea store. A non-food retail warehouse has also permitted at Denbigh North.

5.3 New developments in CMK include a major extension to the existing CMK shopping building (The centre: mk) with over 50,000 sq metres (gross) of comparison A1 floorspace, and a new Waitrose food store of around 3,400 sq metres (gross) as part of a major mixed use development in CMK. Outline planning permission has been granted (Ref MK/1827/02) for this scheme and details of the development are expected to be approved later this year. A new Sainsbury's store of around 10,600 sq metres (gross) is currently under construction at block C4.1 in the City centre. The Council has also resolved to permit enabling retail development of around 19,500 sq metres at the Leisure Plaza site in CMK. Following an exhibition in November 2006, a planning application for the redevelopment of the existing Tesco's store and some unit shops in Wolverton town centre is expected later this year. The Tesco unit is estimated to be over 13,600 sq metres (gross) of floorspace.

5.4 Recently, the Council received an outline planning application for a new Marks and Spencer retail store to provide over 12,500 sq metres of A1 non-food and about 1400 sq metres of convenience floorspace on the site of the non-food retail warehouse permitted at Denbigh North. (Ref 07/01159/OUT). A planning application for a mixed use development of around 1870 sq metres of A1 retail floorspace on the ground floor and up to 9 storeys of residential development comprising 132 units has also been received for Stanier house in Stanier Square, Queensway, Bletchley. (Ref 07/01174/FUL)

6. Policy Context

Regional Planning Guidance

6.1 At present the approved Regional Planning Guidance for the South East is RPG9 (2001), which covers the period to 2016. However, it is due to be replaced by the South East Plan, which sets out a vision for the region through from 2006 – 2026. An Examination in Public into the plan ran from 27 November 2006 to 30 March 2007 and the Panel appointed to carry out independent testing of the draft plan, are due to submit their report to Government on 31 July 2007.

6.2 Once adopted the South East Plan will provide the regional context for the development of Milton Keynes to 2026 and the preparation of future Local Development Documents.

6.3 At the sub-regional level an alteration to RPG called the Milton Keynes and South Midlands Sub Regional Strategy was published in March 2005. The SRS provides a clear, agreed sub-regional strategy for the period 2001-2021, and a long-term vision for the sub-region towards the year 2031, as part of the Government's Sustainable Communities Plan. Milton Keynes is expected to embrace its growth potential to mature as a major regional centre particularly through the substantial development of its central area.

Borough of Milton Keynes Local Plan

6.4 The replacement Milton Keynes Local Plan was adopted in December 2005. It is a district-wide plan setting out policies and proposals for the period up to 2011. It is a saved plan until the end of 2008 when it is envisaged as being replaced by the Council's Core Strategy.

- Policy TC1 of the Local Plan sets out a retail hierarchy of centres within the Borough from CMK as a regional centre to the district centres of Kingston, Westcroft Bletchley and Wolverton, the town centres on Newport Pagnell, Olney Woburn Sands and Stony Stratford to Village shops and local centres which could be a single shop or parade of shops. The Plan adopts a deliberately restrictive approach to retail development on non-allocated sites, reflecting the special circumstances of the new city.
- Policy CC1 defines the primary shopping area within the City centre.

The MK 2031 Growth Study

6.5 A series of documents produced by consultants Grimleys and others for Milton Keynes Partnerships outlining a strategy for the future growth of Milton Keynes. Over the period 2016-2021, it envisages expansion of the City with 7-8000 dwellings provided in a growth area to the South-east of Milton Keynes with 4,800 dwellings within the City and 3200 in mid-Bedfordshire district. Two phases of growth are envisaged to the southwest of the City in Aylesbury vale district with 7500 dwellings proposed from 2021 to 2026 and another 7500 dwellings proposed from 2026 to 2031. The MK 2031 study is being used as part of the evidence base for the Council's Core Strategy document.

CB Richard Ellis Milton Keynes Retail Capacity Study 2003

6.6 The Retail Capacity study 2003 concluded:

- CMK should develop into a regional shopping centre with the phased development of the thecentre: mk
- There would be sufficient expenditure to support the new Sainsbury's Superstore and Waitrose in CMK coupled with the closure of the existing Waitrose and Sainsbury's in the Food centre.
- The City is underprovided with DIY goods stores. However, since this report was prepared Homebase and B&Q have opened major new stores within the city at Winterhill and Rooksley.
- After 2006 there should be capacity for additional general bulky retail warehousing floorspace

Local Transport Plan 2

6.7 Details transport projects proposed in the Borough over the next 5 years designed to promote more sustainable access to CMK and other town centres.

7. Current Situation

Central Milton Keynes

7.1 A number of Supplementary Planning Guidance (SPG)/Supplementary Planning Documents (SPD) have been adopted by the Council for CMK, which includes Campbell Park. These include: -

- The CMK Development Framework adopted in 2002
- SPG for Campbell Park adopted in 2003
- SPG for the SW corner of CMK, the Sustainable Residential Quarter adopted in 2003.
- The Central-CMK Framework Supplementary Planning Document adopted 2006

7.2 The main elements of the CMK Development Framework are included within the adopted replacement Local Plan. The Central -CMK Framework Supplementary Planning Document (SPD) covers the area between Saxon Gate, Campbell Park, Portway and Childs Way including the main shopping area.

Older Town Centre Initiatives

7.3 Town Centre Partnerships consisting of local business and community groups, town and parish councils, together with Milton Keynes Council, were established in Bletchley, Stony Stratford, Wolverton, Newport Pagnell and Olney. Their aim was to help revitalise and regenerate the older town centres. In Woburn Sands, no partnership has yet been established, although the Woburn Sands Business and Community Association has been active in promoting the interests of the town.

7.4 These partnerships (particularly in Wolverton and Newport Pagnell) have been very active in preparing Business Plans, setting out a vision for their individual town centre. Of all these town centre partnerships, Wolverton has been the most pro-active.

7.5 It is not the purpose of this study to identify specific improvements for individual town centres, rather to develop an overall retail strategy for the Borough and identify individual sites for development. The successful tenderer may wish to talk to key stakeholders within these town centres.

Bletchley Regeneration Study

7.6 The Council, together with English Partnerships (EP), commissioned EDAW Ltd to produce a regeneration strategy for Bletchley, identifying specific sites where EP might make a long-term investment. The study takes forward earlier work on the town centre, and will examine its long-term role both locally and in relation to the City as a whole. The report was produced in December 1999.

7.7 The Council adopted the Central Bletchley Regeneration Strategy as Supplementary Planning Guidance in July 2004; it identifies a number of key projects to regenerate central Bletchley.

Kingston and Westcroft

7.8 These two centres, completed in the 1990s, lie on the east and west flanks of the City. In the Local Plan, they have the status of District Centres.

7.9 In November 1998, Tesco won an appeal against a decision by the Council to refuse planning permission for an extension of the existing Tesco store at Kingston. In his decision letter, the Inspector commented that "PPG6 is clear that such centres should be regarded as the preferred location for developments which attract many trips"; he also felt "the focusing of activity at major nodes such as district centres to be in line with the movement towards greater sustainability in the future development of the City."

7.10 In line with Local Plan policy the Council is seeking to diversify the 'offer' of these centres to make them more like existing town centres with more community and leisure uses.

Pressure for Development

7.11 The City continues to attract considerable interest from major retailers who are either not currently represented within the City or from other retailers (Tesco, Sainsbury and retail warehouse interests) who are also seeking to expand their existing operations.

8. Available Information

8.1 A list of all the documents and other sources of information that will be available to you, if appointed, is set out in Appendix 1. The majority of this material is available to view or download from the web, prior to making your submission

9. Presentation of the Report

9.1 You will be required to formally present and discuss your conclusions with Members of the Local Development Framework Advisory Panel and other members of the Council and other key stakeholders following completion of your report. If the final document is the subject of debate at the examination into the Core Strategy, the Council may require you to attend the Public Examination on its behalf for which a separate fee will need to be negotiated.

10. Documents

10.1 We will also require an electronic copy and 6 printed copies of your report, including any supporting schedules / tables, plans and illustrative material, plus a master copy for printing further copies.

10.2 If you wish to transfer documents on disk, the material should be in Microsoft Word.

10.3 On completion of the Report, the ownership of reports and copyright of documents and plans will pass to the Council.

11. Programme and Timescales

11.1 We envisage tenders being received for this work by **Friday 27th July**

11.2 Allowing for survey work in September and some discussion of the results of that work with the Council subsequently, we envisage a draft version of your report being completed by **Friday 2nd November 2007**. The report would be required by **Friday 9th November 2007**.

11.3 The total length of the project, from appointment around the **3rd August 2007** to report on **Friday 9th November**, is therefore anticipated at about 14 weeks. Your submission should make clear if, in your view, the requirements of the brief cannot be met within this time period.

12. Selection Criteria and Weighting and Budget information

12.1 The selection criteria for this project will comprise the following elements

- Price -50%
- Past experience in doing these projects-10%
- Level of understanding of the task –20%
- Methodology for completing task- 20%

12.2 A maximum sum of £60,000 (excluding VAT) is available for this work (Your submission should make clear the extent to which the requirements of the brief can be met within this financial limit. Significant consideration will be given to those bids that come in below this maximum but still display a high level of quality.

12.3 Prospective tenderers should confirm that they have no conflict of interest in undertaking this work.

12.4 The Council proposes that the payment schedule on this project will be as follows:

- Money to be paid following receipt of a satisfactory report, to be certified in writing by the Council.

13. Tenders

13.1 Tenders should be submitted to the Council via the Intend system by **Friday 27th, July 2007**.

13.2 Tender submissions should contain the following information:

a) A description of the approach you will adopt in undertaking the Review, and how this recognises the unique circumstances of Milton Keynes

b) Your programme for the work and the timing of regular progress or other meetings

c) An indication of your team members, their areas of responsibility and the extent of their involvement in the Review; this should also include details of any specialist survey firm you intend to use

d) Your expectations of Council officers in contributing to the Review.

e) Brief details of similar work carried out for local authorities during say, the last two years, including copies of any studies of a comparable nature (if possible/relevant) and contact names at the client authorities

f) Your fee: you should state whether this is inclusive or whether there may be further areas of work which would require the negotiation of additional fees, and if so, on what basis; the costs of any survey work to be carried out should be specifically identified within the total fee.

g) Breakdown of fees: your tender should include details of the number of staff expected to work on the project, their hourly rate and the amount of time each person is expected to work on the project.

13.3 You may be invited to present and discuss your submission with officers of the Council prior to an appointment being made. These interviews will take place on **Tuesday 31st July and Wednesday 1st August** at the Council's Civic Offices.

13.4 A decision on the successful tender submission will be made by **Friday 3rd August 2007**. An appointment will not be made solely on the basis of the lowest price.

13.5 The Council requires all contracts to comply with the conditions set out in the enclosed document, "Milton Keynes Council: Contract Documentation". Your attention is drawn to the need to indemnify the Council and have the necessary public liability (£5m) and employers liability insurance (£10m).

13.6 If you wish to submit a joint tender with other consultants, then the split of responsibilities, work and costs between the firms should be detailed.

14. Further Information

14.1 If you require any further information in order to prepare your submission, please make contact via the Intend system.

14.2 Officers will be available for meetings and to answer questions prior to any submission of tenders during the period up to **Friday 27th July 2007**.

14.3 Any response to requests for additional information or clarification will be sent to all tenderers.

Michael Moore
Senior Planning Officer
(Development Plans)

25 February 2010

Appendix 1: Sources of Information

1. **Milton Keynes Council Reports and Information**

Retail Strategy Review

- Milton Keynes Retail Capacity Study (2003) available in paper format only from the Council. Contact Beryl Bowley or Shivan Agashe on 01908-252599 for a copy or e-mail. Beryl.Bowley@Milton-keynes.gov.uk or Shivanjali.Agashe@Milton-keynes.gov.uk

Borough of Milton Keynes Local Plan

- Adopted Local Plan (2005)

Available at:

http://www.mkweb.co.uk/local%5Fplan%5Freview/DisplayArticle.asp?ID=29798

- LP Inspector's Report Parts 1&2 (2004) available at: -

http://www.milton-keynes.gov.uk/local_plan_review/DisplayArticle.asp?ID=22887

- LP Inquiry Topic Paper 5: Town Centres and Retail Strategy (2003)
- LP Inquiry Topic Paper 7: Central Milton Keynes (2003)

Available from the Council's planning policy web pages at: -

http://www.milton-keynes.gov.uk/local_plan_review

Supplementary Planning Guidance

1) Adopted Western Expansion Area Development Framework - November 2005

2) Eastern Expansion Area Development Framework - October 2005

Available at:

http://www.mkweb.co.uk/local%5Fplan%5Freview/DisplayArticle.asp?ID=22462

MK 2031 Growth Study

http://www.miltonkeynespartnership.info/future_plans/MK_2031_documents.php

A Core Strategy for Milton Keynes (Preferred Options) September 2007

LDF Advisory Group report for meeting on 20th June 2007 available at

http://cmis.milton-keynes.gov.uk/cmiswebpublic/MeetingDocuments.aspx?Meeting=8054

Local Transport Plan 2

Available at: -

http://www.milton-keynes.gov.uk/transport/DisplayArticle.asp?ID=13775

Population Bulletin (2006/2007)

Includes population, housing and labour force forecasts up to 2011 and population projections until 2031.

Available at: -

http://www.mkiobservatory.org.uk/viewArticle.aspx?va_artID=2879&IWCM_wizardType=6&IWCM_resourceIsNew=false

Central Milton Keynes

- Executive summary of the overarching Central Milton Keynes Development Framework (scroll down the page) – Adopted CMK Development Framework - October 2001 Full copy in paper format only

  Available at: -

  http://www.englishpartnerships.co.uk/publications.htm

- SPG for Campbell Park (2003)
- SPG for the Sustainable Residential Quarter (2003) both available at: -

  http://www.milton-keynes.gov.uk/urban-design/DisplayArticle.asp?ID=18647

- Central CMK SPD (September 2006) available at:

  http://www.milton-keynes.gov.uk/mkgrowth/DisplayArticle.asp?ID=34295

Retail occupancy information

Details of current ground occupancy in CMK, district centres, local centres and retail warehouse parks, contact Julie-Ann.Hammond@Milton-keynes.gov.uk. Tel 01908-254255

2. Older Town Centres

Relevant studies:

Bletchley

- The Central Bletchley Regeneration Strategy adopted as Supplementary Planning Guidance on 20th July 2004 is available at: -

http://www.milton-keynes.gov.uk/urban%2Ddesign/DisplayArticle.asp?ID=23139

Wolverton

- Wolverton Area Action Plan Preferred Options document (2006) available from the Council. Contact Beryl Bowley or Shivan Agashe for a copy contact details above.

- Wolverton Regeneration Strategy (2004) available at:

http://www.milton-keynes.gov.uk/urban-design/DisplayArticle.asp?ID=23836

The Council's regeneration web site lists current initiatives in the older towns such as Olney and Newport Pagnell.

http://www.miltonkeynes.gov.uk/regeneration/home.asp

3. Other

- CB Richard Ellis- MK Retail Needs Assessment November 2006 available from the Council's planning policy web pages at: -

  http://www.milton-keynes.gov.uk/local_plan_review

- Turleys Associates Report available from the Council. Contact Michael Moore on 01908-252352 or e-mail michael.moore@milton-keynes.gov.uk

- The Milton Keynes & South Midlands Sub-Regional Strategy (March 2005) is available at:

  http://www.go-se.gov.uk/gose/ourRegion/growthAreas/mksmGrowth/srs/

- Office of the Deputy Prime Minister (2003). Sustainable Communities: Building for the Future. (The Sustainable Communities Plan) London: Stationary Office

  This ODPM report is now available on The Communities and Local Government website at:-

  www.communities.gov.uk

South East Plan

Available at:

http://www.southeast-ra.gov.uk/southeastplan/

APPENDIX 2

HEALTH CHECK DATA

Table PA1

Diversity of uses - Central Milton Keynes (Surveyed Jan 2008)

Source: Experian Goad

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Index (UK 100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1.91%	6	1.72%	90
G1B	Butchers	0.74%	0	0.00%	0
G1C	Greengrocers & fishmongers	0.65%	0	0.00%	0
G1D	Grocery and frozen foods	2.82%	8	2.30%	82
G1E	Off-licences and home brew	0.68%	1	0.29%	42
G1F	Confectioners, tobacconists, newsagents	2.29%	5	1.44%	63
	TOTAL	**9.08%**	**20**	**5.75%**	**63**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repairs	2.32%	14	4.02%	173
G2B	Men's & boys' wear	1.20%	11	3.16%	263
G2C	Women's, girls, children's clothing	5.52%	38	10.92%	198
G2D	Mixed and general clothing	3.38%	29	8.33%	247
G2E	Furniture, carpets & textiles	3.95%	1	0.29%	7
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.17%	15	4.31%	103
G2G	Electrical, home entertainment, telephones and video	4.53%	19	5.46%	121
G2H	DIY, hardware & household goods	2.84%	1	0.29%	10
G2I	Gifts, china, glass and leather goods	1.68%	10	2.87%	171
G2J	Cars, motorcycles & motor accessories	1.31%	0	0.00%	0
G2K	Chemists, toiletries & opticians	3.95%	13	3.74%	95
G2L	Variety, department & catalogue showrooms	0.92%	6	1.72%	187
G2M	Florists and gardens	1.00%	1	0.29%	29
G2N	Sports, toys, cycles and hobbies	2.37%	20	5.75%	242
G2O	Jewellers, clocks & repair	2.33%	21	6.03%	259
G2P	Charity shops, pets and other comparison	3.73%	1	0.29%	8
	TOTAL	**45.22%**	**200**	**57.47%**	**127**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.39%	52	14.94%	104
G3B	Hairdressers, beauty parlours & health centres	7.35%	18	5.17%	70
G3C	Laundries & drycleaners	0.96%	1	0.29%	30
G3D	Travel agents	1.59%	2	0.57%	36
G3E	Banks & financial services (incl. accountants)	4.40%	16	4.60%	104
G3F	Building societies	0.67%	2	0.57%	86
G3G	Estate agents & auctioneers	3.91%	6	1.72%	44
	TOTAL	**33.28%**	**97**	**27.87%**	**84**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	1.31%	5	1.44%	110
G4B	Vacant units (all categories)	11.11%	26	7.47%	67
	TOTAL	**12.42%**	**31**	**8.91%**	**72**
	GRAND TOTAL	**100.00%**	**348**	**100.00%**	

Table PA2

Diversity of uses - Bletchley (Surveyed Jan 2008)

Source: Experian Goad

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Index (UK 100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1.91%	2	1.28%	67
G1B	Butchers	0.74%	2	1.28%	173
G1C	Greengrocers & fishmongers	0.65%	1	0.64%	99
G1D	Grocery and frozen foods	2.82%	7	4.49%	159
G1E	Off-licences and home brew	0.68%	1	0.64%	94
G1F	Confectioners, tobacconists, newsagents	2.29%	3	1.92%	84
	TOTAL	**9.08%**	**16**	**10.26%**	**113**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repairs	2.32%	2	1.28%	55
G2B	Men's & boys' wear	1.20%	0	0.00%	0
G2C	Women's, girls, children's clothing	5.52%	5	3.21%	58
G2D	Mixed and general clothing	3.38%	2	1.28%	38
G2E	Furniture, carpets & textiles	3.95%	5	3.21%	81
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.17%	5	3.21%	77
G2G	Electrical, home entertainment, telephones and video	4.53%	6	3.85%	85
G2H	DIY, hardware & household goods	2.84%	5	3.21%	113
G2I	Gifts, china, glass and leather goods	1.68%	0	0.00%	0
G2J	Cars, motorcycles & motor accessories	1.31%	4	2.56%	196
G2K	Chemists, toiletries & opticians	3.95%	7	4.49%	114
G2L	Variety, department & catalogue showrooms	0.92%	0	0.00%	0
G2M	Florists and gardens	1.00%	2	1.28%	128
G2N	Sports, toys, cycles and hobbies	2.37%	1	0.64%	27
G2O	Jewellers, clocks & repair	2.33%	4	2.56%	110
G2P	Charity shops, pets and other comparison	3.73%	10	6.41%	172
	TOTAL	**45.22%**	**58**	**37.18%**	**82**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.39%	21	13.46%	94
G3B	Hairdressers, beauty parlours & health centres	7.35%	14	8.97%	122
G3C	Laundries & drycleaners	0.96%	1	0.64%	67
G3D	Travel agents	1.59%	3	1.92%	121
G3E	Banks & financial services (incl. accountants)	4.40%	9	5.77%	131
G3F	Building societies	0.67%	1	0.64%	96
G3G	Estate agents & auctioneers	3.91%	10	6.41%	164
	TOTAL	**33.28%**	**59**	**37.82%**	**114**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	1.31%	1	0.64%	49
G4B	Vacant units (all categories)	11.11%	22	14.10%	127
	TOTAL	**12.42%**	**23**	**14.74%**	**119**
	GRAND TOTAL	**100.00%**	**156**	**100.00%**	

Table PA3

Diversity of uses - Westcroft (Surveyed Jul 2007)

Source: Experian Goad

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Index (UK 100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1.91%	0	0.00%	0
G1B	Butchers	0.74%	0	0.00%	0
G1C	Greengrocers & fishmongers	0.65%	0	0.00%	0
G1D	Grocery and frozen foods	2.82%	1	5.26%	187
G1E	Off-licences and home brew	0.68%	0	0.00%	0
G1F	Confectioners, tobacconists, newsagents	2.29%	0	0.00%	0
	TOTAL	**9.08%**	**1**	**5.26%**	**58**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repairs	2.32%	0	0.00%	0
G2B	Men's & boys' wear	1.20%	0	0.00%	0
G2C	Women's, girls, children's clothing	5.52%	0	0.00%	0
G2D	Mixed and general clothing	3.38%	2	10.53%	311
G2E	Furniture, carpets & textiles	3.95%	0	0.00%	0
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.17%	0	0.00%	0
G2G	Electrical, home entertainment, telephones and video	4.53%	1	5.26%	116
G2H	DIY, hardware & household goods	2.84%	1	5.26%	185
G2I	Gifts, china, glass and leather goods	1.68%	0	0.00%	0
G2J	Cars, motorcycles & motor accessories	1.31%	1	5.26%	402
G2K	Chemists, toiletries & opticians	3.95%	2	10.53%	266
G2L	Variety, department & catalogue showrooms	0.92%	0	0.00%	0
G2M	Florists and gardens	1.00%	0	0.00%	0
G2N	Sports, toys, cycles and hobbies	2.37%	0	0.00%	0
G2O	Jewellers, clocks & repair	2.33%	0	0.00%	0
G2P	Charity shops, pets and other comparison	3.73%	2	10.53%	282
	TOTAL	**45.22%**	**9**	**47.37%**	**105**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.39%	4	21.05%	146
G3B	Hairdressers, beauty parlours & health centres	7.35%	1	5.26%	72
G3C	Laundries & drycleaners	0.96%	0	0.00%	0
G3D	Travel agents	1.59%	1	5.26%	331
G3E	Banks & financial services (incl. accountants)	4.40%	0	0.00%	0
G3F	Building societies	0.67%	0	0.00%	0
G3G	Estate agents & auctioneers	3.91%	1	5.26%	135
	TOTAL	**33.28%**	**7**	**36.84%**	**111**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	1.31%	0	0.00%	0
G4B	Vacant units (all categories)	11.11%	2	10.53%	95
	TOTAL	**12.42%**	**2**	**10.53%**	**85**
	GRAND TOTAL	**100.00%**	**19**	**100.00%**	

Table PA4

Diversity of uses - Kingston (Surveyed Jul 2007)

Source: Experian Goad

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Index (UK 100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1.91%	0	0.00%	0
G1B	Butchers	0.74%	0	0.00%	0
G1C	Greengrocers & fishmongers	0.65%	0	0.00%	0
G1D	Grocery and frozen foods	2.82%	2	7.14%	253
G1E	Off-licences and home brew	0.68%	0	0.00%	0
G1F	Confectioners, tobacconists, newsagents	2.29%	0	0.00%	0
	TOTAL	**9.08%**	**2**	**7.14%**	**79**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repairs	2.32%	2	7.14%	308
G2B	Men's & boys' wear	1.20%	0	0.00%	0
G2C	Women's, girls, children's clothing	5.52%	1	3.57%	65
G2D	Mixed and general clothing	3.38%	2	7.14%	211
G2E	Furniture, carpets & textiles	3.95%	0	0.00%	0
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.17%	2	7.14%	171
G2G	Electrical, home entertainment, telephones and video	4.53%	2	7.14%	158
G2H	DIY, hardware & household goods	2.84%	0	0.00%	0
G2I	Gifts, china, glass and leather goods	1.68%	0	0.00%	0
G2J	Cars, motorcycles & motor accessories	1.31%	1	3.57%	273
G2K	Chemists, toiletries & opticians	3.95%	2	7.14%	181
G2L	Variety, department & catalogue showrooms	0.92%	1	3.57%	388
G2M	Florists and gardens	1.00%	0	0.00%	0
G2N	Sports, toys, cycles and hobbies	2.37%	1	3.57%	151
G2O	Jewellers, clocks & repair	2.33%	0	0.00%	0
G2P	Charity shops, pets and other comparison	3.73%	2	7.14%	191
	TOTAL	**45.22%**	**16**	**57.14%**	**126**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.39%	5	17.86%	124
G3B	Hairdressers, beauty parlours & health centres	7.35%	2	7.14%	97
G3C	Laundries & drycleaners	0.96%	1	3.57%	372
G3D	Travel agents	1.59%	2	7.14%	449
G3E	Banks & financial services (incl. accountants)	4.40%	0	0.00%	0
G3F	Building societies	0.67%	0	0.00%	0
G3G	Estate agents & auctioneers	3.91%	0	0.00%	0
	TOTAL	**33.28%**	**10**	**35.71%**	**107**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	1.31%	0	0.00%	0
G4B	Vacant units (all categories)	11.11%	0	0.00%	0
	TOTAL	**12.42%**	**0**	**0.00%**	**0**
	GRAND TOTAL	**100.00%**	**28**	**100.00%**	

Table PA5

Diversity of uses - Newport Pagnell (Surveyed Feb 2006)

Source: Experian Goad

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Index (UK 100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1.91%	4	3.60%	189
G1B	Butchers	0.74%	1	0.90%	122
G1C	Greengrocers & fishmongers	0.65%	1	0.90%	139
G1D	Grocery and frozen foods	2.82%	2	1.80%	64
G1E	Off-licences and home brew	0.68%	1	0.90%	132
G1F	Confectioners, tobacconists, newsagents	2.29%	2	1.80%	79
	TOTAL	**9.08%**	**11**	**9.91%**	**109**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repairs	2.32%	2	1.80%	78
G2B	Men's & boys' wear	1.20%	0	0.00%	0
G2C	Women's, girls, children's clothing	5.52%	2	1.80%	33
G2D	Mixed and general clothing	3.38%	0	0.00%	0
G2E	Furniture, carpets & textiles	3.95%	8	7.21%	182
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.17%	4	3.60%	86
G2G	Electrical, home entertainment, telephones and video	4.53%	5	4.50%	99
G2H	DIY, hardware & household goods	2.84%	5	4.50%	159
G2I	Gifts, china, glass and leather goods	1.68%	1	0.90%	54
G2J	Cars, motorcycles & motor accessories	1.31%	1	0.90%	69
G2K	Chemists, toiletries & opticians	3.95%	6	5.41%	137
G2L	Variety, department & catalogue showrooms	0.92%	1	0.90%	98
G2M	Florists and gardens	1.00%	3	2.70%	270
G2N	Sports, toys, cycles and hobbies	2.37%	3	2.70%	114
G2O	Jewellers, clocks & repair	2.33%	2	1.80%	77
G2P	Charity shops, pets and other comparison	3.73%	6	5.41%	145
	TOTAL	**45.22%**	**49**	**44.14%**	**98**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.39%	17	15.32%	106
G3B	Hairdressers, beauty parlours & health centres	7.35%	11	9.91%	135
G3C	Laundries & drycleaners	0.96%	1	0.90%	94
G3D	Travel agents	1.59%	1	0.90%	57
G3E	Banks & financial services (incl. accountants)	4.40%	6	5.41%	123
G3F	Building societies	0.67%	1	0.90%	134
G3G	Estate agents & auctioneers	3.91%	9	8.11%	207
	TOTAL	**33.28%**	**46**	**41.44%**	**125**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	1.31%	3	2.70%	206
G4B	Vacant units (all categories)	11.11%	2	1.80%	16
	TOTAL	**12.42%**	**5**	**4.50%**	**36**
	GRAND TOTAL	**100.00%**	**111**	**100.00%**	

Table PA6

Diversity of uses - Stony Stratford (Surveyed Feb 2006)

Source: Experian Goad

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Index (UK 100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1.91%	3	2.50%	131
G1B	Butchers	0.74%	2	1.67%	225
G1C	Greengrocers & fishmongers	0.65%	1	0.83%	128
G1D	Grocery and frozen foods	2.82%	1	0.83%	30
G1E	Off-licences and home brew	0.68%	1	0.83%	123
G1F	Confectioners, tobacconists, newsagents	2.29%	4	3.33%	146
	TOTAL	**9.08%**	**12**	**10.00%**	**110**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repairs	2.32%	2	1.67%	72
G2B	Men's & boys' wear	1.20%	1	0.83%	69
G2C	Women's, girls, children's clothing	5.52%	4	3.33%	60
G2D	Mixed and general clothing	3.38%	4	3.33%	99
G2E	Furniture, carpets & textiles	3.95%	3	2.50%	63
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.17%	9	7.50%	180
G2G	Electrical, home entertainment, telephones and video	4.53%	6	5.00%	110
G2H	DIY, hardware & household goods	2.84%	2	1.67%	59
G2I	Gifts, china, glass and leather goods	1.68%	3	2.50%	149
G2J	Cars, motorcycles & motor accessories	1.31%	6	5.00%	382
G2K	Chemists, toiletries & opticians	3.95%	4	3.33%	84
G2L	Variety, department & catalogue showrooms	0.92%	0	0.00%	0
G2M	Florists and gardens	1.00%	0	0.00%	0
G2N	Sports, toys, cycles and hobbies	2.37%	7	5.83%	246
G2O	Jewellers, clocks & repair	2.33%	1	0.83%	36
G2P	Charity shops, pets and other comparison	3.73%	6	5.00%	134
	TOTAL	**45.22%**	**58**	**48.33%**	**107**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.39%	18	15.00%	104
G3B	Hairdressers, beauty parlours & health centres	7.35%	11	9.17%	125
G3C	Laundries & drycleaners	0.96%	3	2.50%	260
G3D	Travel agents	1.59%	2	1.67%	105
G3E	Banks & financial services (incl. accountants)	4.40%	3	2.50%	57
G3F	Building societies	0.67%	1	0.83%	124
G3G	Estate agents & auctioneers	3.91%	8	6.67%	171
	TOTAL	**33.28%**	**46**	**38.33%**	**115**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	1.31%	0	0.00%	0
G4B	Vacant units (all categories)	11.11%	4	3.33%	30
	TOTAL	**12.42%**	**4**	**3.33%**	**27**
	GRAND TOTAL	**100.00%**	**120**	**100.00%**	

Table PA7

Current retailer requirements – Central Milton Keynes (July 2009)

Source: Focus Property Database

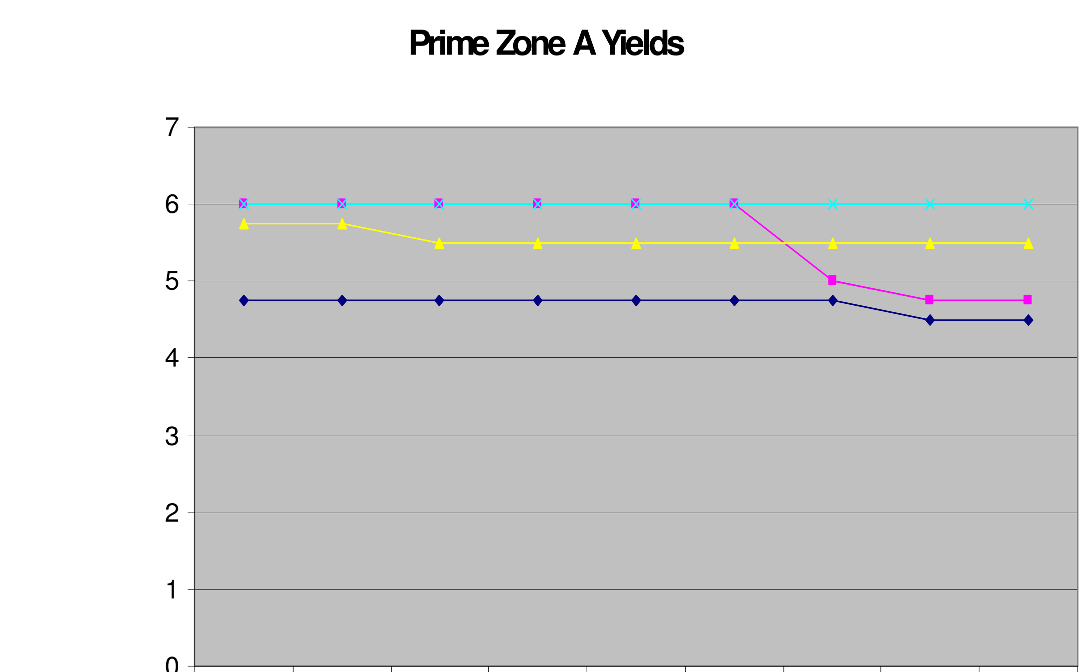
Operator	Mininum requirement (sq.ft gross)	Maximum requirement (sq.ft gross)	Median requirement (sq.ft gross)
Convenience goods operators (total: 4 / 12%)			
The Bakers Oven	1,750	3,000	2,375
Un-named CTN retailer	1,000	1,500	1,250
Greggs Plc	800	1200	1,000
Ditsch	130	500	315
Sub-total	*3,680*	*6,200*	*4,940*
Comparison goods operators (total: 20 / 61%)			
TJ Hughes	25,000	150,000	87,500
Esprit	6,459	10,764	8,612
Republic	5,000	8,000	6,500
99P Stores	3000	6000	4,500
Zara Home	2,692	3,230	2,961
Yours Clothing	2,500	3,500	3,000
Gerry Weber	2,500	4,000	3,250
Kathmandu UK Ltd	1,750	3,500	2,625
Quiz Clothing	1,500	2,500	2,000
Animal	1,500	2,000	1,750
Leia	1,300	2,100	1,700
Bags Etc	1000	1500	1,250
Wheels of Sport	1,000	2,500	1,750
Profile Clothing	1,000	6,000	3,500
Buy the Book	1,000	2,000	1,500
HPJ Jewellers	700	1,200	950
Phase Eight	700	1,500	1,100
Garage Street Shoes	600	1,200	900
Rituals	600	1,200	900
Magnolia	26	68	47
Sub-total	*59,827*	*212,762*	*136,295*
Services operators (total: 9 / 27%)			
Terra Cotta (Atlantis Enterprises)	5,000	12,000	8,500
Hooters	4,000	8,000	6,000
Café Rouge	2,500	3,500	3,000
Tantra (Atlantis Enterprises)	2,500	5,000	3,750
Burger King	1,500	2,500	2,000
Rush Hair	1,000	2,000	1,500
Pret a Manger	850	3000	1,925
Subway	600	2000	1,300
Fuel Juice Bars	200	500	350
Sub-total	*18,150*	*38,500*	*28,325*

Note – listed requirements exclude charity shops and requirement for out-of-centre retail floorspace

Figure PA8

Prime Zone A Retail Yields - Central Milton Keynes and comparator centres

Source: Valuation Office Property Market Report (July 2008)



	2000	2001	2002	2003	2004	2005	2006	2007	2008
Central MK	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.5	4.5
Northampton	6	6	6	6	6	6	5	4.75	4.75
Luton	5.75	5.75	5.5	5.5	5.5	5.5	5.5	5.5	5.5
Bedford	6	6	6	6	6	6	6	6	6