South West Milton Keynes

# Retail Assessment

Jones Lang LaSalle

OCTOBER 2014

# Contents

# 1 Introduction

1.1 This report has been prepared on behalf of the South West Milton Keynes Consortium as part of the information accompanying the planning application for the development of the South West Milton Keynes Strategic Development Area, in North East Aylesbury Vale.

1.2 The development area is situated to the immediate south west of Milton Keynes and will contain up to 1,855 dwellings with ancillary community, commercial, cultural, educational, infrastructure, leisure and sporting facilities. For the retail element, the proposals include a Neighbourhood Centre which will contain a modest foodstore and other shops that can accommodate a range of uses that fall into use classes A1, A2, A3, A4 and A5.

1.3 The focus of this report is to assess the implications of the proposed foodstore providing predominately convenience goods on surrounding centres.

### Structure of Report

1.4 The application site is discussed in greater detail in Section 2. This section also describes the current role of the main centres in the area and outlines the main convenience retail provision that is currently available.

1.5 Section 3 discusses the proposal and sets out the basic premise of the development.

1.6 Section 4 considers the planning policies at a national and local level. This section also considers the need for and purpose of the sequential approach and impact assessment.

1.7 The National Planning Policy Framework requires that applications for retail should be supported by evidence demonstrating compliance with the sequential test and likely economic impact on existing centres. The sequential test is considered in Section 6 and the impact assessment that has been undertaken is set out in Section 7.

1.8 A summary and the conclusions are provided at Section 8 of this report.

# 2 Site Description and Context

## Site Description

2.1 The application site lies within the District of Aylesbury Vale. However, in geographic terms it is immediately to the southwest of Milton Keynes.

2.2 The A421 dual carriageway runs along the site's northern boundary which links with the M1 further to the east. On the northern side of the A421, land has relatively recently been developed at Snelshall East and West for warehousing and related employment uses. Adjacent and further north beyond this is Tattenhoe Park – a planned but yet to be built out residential development.

2.3 East of the application site and within Milton Keynes is a residential area known as Far Bletchley. Beyond Far Bletchley, Buckingham Road continues east through to Bletchley town centre.

2.4 The southern boundary of the application site is bordered by the currently disused East/West railway line. Newton Longville, a village of approximately 1,800 persons, is situated some 1.5 kilometres to the south of the application site boundary.

2.5 The western boundary of the application site is defined by Whaddon Road which, like the application site, also falls within the district of Aylesbury Vale.

## Retail Context

2.6 Milton Keynes Central is a centre of regional significance while Bletchley, Wolverton, Westcroft and Kingston are identified by Milton Keynes Council as second tier District Centres. Newport Pagnall, Olney, Stony Stratford and Woburn Sands are identified as third tier established town centres.

2.7 Milton Keynes is the principal shopping destination for comparison goods in the area and, to a lesser extent, for convenience goods.

2.8 Milton Keynes' grid based road network offers excellent accessibility by car and many centres have extensive car parking which is often free. Given that the vast majority of food shopping trips are undertaken by car and the road network generally offers quick, hassle free travel, shoppers have several large supermarkets to choose from.

2.9 Milton Keynes Central and the centres of Bletchley (including its significant out-of-centre provision) and Westcroft have a strong influence on the retail environment in southwest Milton Keynes and therefore these centres will have a strong influence upon the potential of the application site.

2.10 The central and western shopping centres which make up the retail and leisure provision in Central Milton Keynes, provide a range of town centre uses. Its convenience offer includes a large new Sainsbury's (5,990m$^2$ gross) in the West End, a Waitrose (2,640m$^2$ gross) store and an Iceland at the Food Centre. However, due to the structural layout of the area, the lack of residential accommodation and its rental profile, it lacks smaller convenience operators.

2.11 Central Milton Keynes' strength lies within its strong comparison offer and it attracts shoppers from Milton Keynes and the wider region beyond.

2.12 Bletchley District Centre lies to the east of application site and is one of the established older centres. It is focused around a traditional High Street. At the western end of the High Street is the 1970's Brunel Shopping Centre. This is anchored by a well-established Sainsbury's (3,600m² gross). Overall, the centre offers a good range of convenience outlets including a number of independent retailers such as a butchers, bakers and greengrocers. The weekly market on the High Street also improves consumer choice and appears popular. The bulk of comparison retailers are independent operators together with a range of multiples and charity shops which generally target the lower end of the market.

2.13 In addition to the town centre, Bletchley also has several out-of-centre stores including an Asda Wal-Mart (13,990m² gross) located adjacent to the MK Dons Stadium and a very large Ikea store. Also close to Bletchley is a Tesco Extra (6,169m² gross), an Iceland and a Lidl.

2.14 Westcroft District Centre is located a short distance, about 2.5 km, to the north of the application site and has the appearance and functionality of a retail park. Accordingly, it is car orientated and offers a poor pedestrian environment. It is anchored by a large Morrisons supermarket (8,595m² gross) which makes up its total convenience offer. The comparison offer is limited to several retail warehouses selling various goods including clothing, household goods, hobby crafts and pet products.

2.15 Approximately 1.5km south of the application site is the village of Newton Longville. This contains a parade of small convenience stores including a general store, hairdressers and take away. As such, it caters for very limited 'top-up' trips and is likely to continue to do so regardless of whatever is delivered at the application site.

2.16 Also of influence, but to a lesser extent, is Buckingham which is located west of Milton Keynes. It is home to a small Tesco Express on the High Street and a larger Waitrose (1,400m² gross) store just off the High Street. In addition, there is also an out-of-centre Tesco (4,433m² gross) south of Buckingham town centre on London Road.

# 3 Proposal

3.1 The proposed community is planned to contain up to 1,855 dwellings, employment land, together with supporting social infrastructure. A key part of that infrastructure is a new neighbourhood centre that will comprise a small convenience store as well as a number of other smaller retail units capable of accommodating uses falling between A1 to A5. The centre will be linked to the rest of the development by all modes of transport.

## The New Centre

3.2 Unlike some previous urban extensions, where the new housing has been used as an excuse to also bring forward large supermarkets and retail warehouses, that is not the case with this application. The scale of the retail element is much more limited and has specifically been designed so that it would provide for the immediate day-to-day needs of the new community, with the main elements being a convenience store of 480m² gross with a net retail sales area of 385m² (net). Given the relatively modest size of the store, the majority of the net sales area will be allocated to the sale of convenience goods (approximately 95%). The comparison retail offer will be limited to an ancillary range of goods.

3.3 It is considered that the limited scale of the retail floor space has been aligned appropriately to the scale of the planned housing growth. To be successful in planning terms, the retail offer in the proposed centre must have sufficient critical mass and be of an appropriate mix to meet the needs and expectations of the future community. If the retail provision is insufficient or cannot differentiate itself from competition it will fail as a vital and viable centre to the detriment of the local community.

3.4 With this in mind, it is considered ideal to deliver the convenience store, the key retail element of the new centre, as early as is reasonable within the development phase in order to meet local needs and establish sustainable patterns of activity. That said it will still need a sufficient number of residents to be viable. As the site is developed, the new centre will be improved through the addition of other shops, services and social infrastructure.

### Composition of the Neighbourhood Centre

3.5 The convenience store will anchor the new centre but will also be accompanied by three smaller units of 150m² (gross) for shops, services, restaurants and cafés to provide a wider range of facilities. These smaller shop units comprise a total of 450m² (gross) retail uses. In addition to the retail offer the centre will also provide 360m² (gross) of community space linked to the adjacent open space and commercial/medical space.

3.6 It is expected that the retail units will accommodate uses that fall within A1 to A5 of the Uses Classes Order. Within this context it needs to be noted that businesses such as sandwich shops and hairdressers fall into Use Class A1.

3.7 It is expected that retail uses falling into Use Class A1 will be limited given the convenience offer within the proposed local convenience store and the presence of the strong convenience and comparison offer in Westcroft nearby.

3.8 The majority of the neighbourhood centre's offer in this location is likely to be based on service providers, dry cleaners, newsagent, A5 takeaways and or A3 catering offers etc. These uses will be supported by the footfall that the convenience store provides and help make the development as a whole be more sustainable by meeting some of the local needs of future residents locally. This will assist in reducing the need to travel.

3.9 It is important to note the retail units may not to come forward until after the convenience store is open and trading, and that store itself will be unlikely to trade at is expected benchmark until the majority of the housing is occupied. With respect to phasing, while many of the retails units might be built in earlier phases, they would not be occupied until there is a commercially viable business to occupy the space. With this in mind the centre is not expected to be fully occupied until after the majority of the housing is built and occupied.

3.10 In summary, at this stage, the exact make-up of this retail floorspace cannot be determined or, as a result, fixed, as it will be necessary for the centre to be able to respond to:

- the requirements of the market and local needs which will be influenced, among other things, by the timing of the wider development; and
- what comes forward elsewhere in the other units, both here and in the wider Milton Keynes area.

3.11 Table A below provides a breakdown of the proposed floorspace and the types of uses proposed for the new neighbourhood centre.

Table A: Proposed Floorspace in Net Square Metres

| Centre | Uses | Proposed Floorspace **(square metres net)** [3] | | | Total |
|---|---|---|---|---|---|
| | | Convenience A1 | Comparison A1 | Other A1 – A5 | |
| Neighbourhood Centre | Convenience store[1] | 365 | 20 | | 385 |
| | Others[2]: pharmacy, optician, off-licence, newsagent, hairdressers, dry cleaners, hot food takeaway, café, restaurant, estate agent | 0 | 0 | 360 | 360 |
| TOTAL | | 365 | 20 | 360 | 745 |

Notes:

1. For convenience stores the net retail sales area defined by PPS4 (now superseded) comprises: the sales area within the building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
2. Indicative areas for the small retail units may be subject to change to reflect local requirements and market conditions at the time of construction or opening.
3. Gross to net for retail floorspace is 80:20.

3.12 By way of a comparison with other existing stores, the proposed convenience store at 385$m^2$ net (480$m^2$ gross) would accommodate a Tesco Express or similar. There are a number of examples in the wider area of such small local foodstores that focus on serving only their immediate neighbourhood. The proposal has been designed to be the local 'corner-store', which will help anchor a small parade of shops offering a range of services to the new residents in this development.

# 4 Qualitative Benefits of the Proposal

### Introduction

4.1 The proposed neighbourhood centre proposals will provide an important range of community infrastructure and facilities that will ensure the delivery of a sustainable mixed use development. The inclusion of a centre anchored by a modest convenience store will mean that the centre is able to keep some spending local, provide employment and reduce the need to travel. Providing such local facilities is sustainable and in the interests of good planning when bringing forward a new housing neighbourhood. It is also important to the success of the planned new community.

### Addressing Local Needs

4.2 The proposed retail provision is of a composition, scale and form that is designed only to meet the needs of the prospective population and appropriate for the local catchment that the centre will serve.

4.3 The Milton Keynes Retail Capacity Update (2011) recognises that convenience shopping is localised. To this end it is appropriate that future floorspace needs should be aligned with the main areas of population growth. Accordingly it is considered that the retail offer proposed should comprise a new neighbourhood centre anchored by a convenience store, together with a range of other shops and services.

4.4 A new centre in this location would not only address the needs of the new population but also address the needs of the adjacent employment area. In line with the NPPF, the centre also seeks to improve consumer choice and competition and reduce the need to travel.

4.5 The proposals are of a composition that seeks to ensure that people's immediate everyday needs, such as convenience shopping, are met on a localised basis. The proposals have been carefully formulated to ensure that they will be able to provide an offer that will be able to attract customers on a regular basis throughout the year. With this in mind, the food offer is of a size that is designed to meet the needs of its catchment and establish sustainable shopping patterns, so that future residents do not have to travel to stores further afield.

4.6 Overall, the scale of the new centre sits comfortably within the retail hierarchy as a local facility meeting local needs, generated by the development itself, without creating a major new retail destination.

### Retaining Local Spend

4.7 When looking at the application site in isolation, the analysis undertaken in Section 6 shows that its population is expected to generate some £10.2m by 2024. This spending would support a significant amount of floorspace. Insofar as the proposed convenience store is concerned (based on sales density of £12,000 per square metre, £10.2m would support 847m² of net convenience floorspace (about 1,058m² gross). This demonstrates that the prospective residents of SWMK alone are capable of supporting a significant amount of convenience floorspace. By way of a comparison, the convenience store that forms part of this application has a net convenience floorspace of 365m² (480m² gross).

4.8 Table 4 of Appendix 2 indicates an increase in potential spending on convenience goods in the local area from £83.2m in 2014 to £101.4m in 2021 and £112.6m in 2024. For SWMK alone spending on convenience goods is expected to increase from £5.4m in 2021 to £10.2m in 2024, by which time SWMK is expected to be completed and occupied. Table B below summarises this growth up to 2024.

Table B: Spending Growth

| Time Period | Assessment Area | SWMK |
|---|---|---|
| 2014 – 2021 | £18.2m | £5.4m |
| 2021 – 2024 | £11.2m | £4.8m |
| Total | £29.4m | £10.2m |

*Source: Table 4 of Appendix 2 with SWMK*

4.9 Some of the wider area is underserved and many people, therefore, use the established facilities like the Morrisons at Westcroft or travel further to the out-of-centre Tesco and Asda at Bletchley. The proposed new centre provides an opportunity to direct spending, albeit a modest amount, towards a 'town centre' destination. As the proposal is to include a modern convenience store together with a range of other shops, services and social infrastructure set within an attractive shopping environment, we expect that it will attract some trade from beyond SWMK.

4.10 Accordingly, in addition to the spending generated by the prospective residents of SWMK, the proposal will assist in addressing the needs of resident populations in adjacent neighbourhoods and from the rural areas to the west. The Study Area Plan provided at Appendix 1 includes these locations.

4.11 Successful and sustainable centres should seek to capture a high proportion of local trade and reduce the outflow of spending to centres further afield and out-of-centre destinations. In particular the introduction of a new convenience store and the associated shopping provision is expected to reduce the outflow of spending together with an associated reduction in the need to travel.

4.12 Once complete, the new centre at SWMK will offer a high quality shopping environment which will enable it to compete against the nearby out-of-centre competition that currently draws a significant amount of the local area's spending. As the limited scale of the proposal can easily be supported by the new population at South West Milton Keynes alone, without requiring any trade diversion, a harmful impact arising from the proposed convenience store is not expected. This issue is addressed in detail in Section 6 of this assessment.

# 5 Policy Background

5.1 A detailed assessment of planning policy is set out in the Planning Statement and Environmental Statement. The commentary below therefore focuses on the key policy issues that are relevant to the retail element of the proposed development.

5.2 Beginning with an analysis of national policy, this chapter will then go on to review regional and finally the local planning policy that has a bearing on the proposed retail aspect of the development.

## National Policy

5.3 On 27 March 2012 the National Planning Policy Framework (NPPF) was adopted. The adoption replaced, with immediate effect, all of the planning policy statements, including Planning Policy Statement 4 'Planning for Sustainable Economic Growth' which formerly, among other things, provided guidance on the assessment of retail development.

5.4 The NPPF however has retained the 'town centre first' approach to retail and other town centre uses. This has effectively put the objectives of PPS4 back into the NPPF.

5.5 Chapter Two of the NPPF 'Ensuring the vitality of town centres' sets out the Government's objectives for England's centres. It provides guidance to local authorities on the plan making process and on the assessment of planning applications for town centre uses.

5.6 With respect to the assessment of planning applications, the NPPF advises that local authorities should apply the sequential test and consider impact. On these subjects the NPPF states, at Paragraph 24 that:

> *"Local planning authorities should apply the sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date local plan"*
>
> And
>
> *"When assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq m). This should include assessment of:*
>
> - *The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
> - *The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made."*

5.7 As with PPS4 the NPPF provides direction on what criteria to apply in determining applications. Paragraph 27 states that "*where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one or more of the above factors, it should be refused*."

## Local Policy

### Aylesbury Vale District Local Plan (AVDLP)

5.8 The Aylesbury Vale District Local Plan (AVDLP) was adopted in January 2004 and is the principal document against which planning applications are assessed. The Local Plan was in the process of being replaced by the emerging Vale of Aylesbury Plan Strategy however this was withdrawn by the Council. There are no policies, either current or emerging, that are directly relevant to the retail aspects of the SWMK proposal.

5.9 For reference, this assessment has had regard to Policy LC1 (New Local Centres) of the Milton Keynes Local Plan 2005 and Policy CS6 (Place-shaping for Sustainable Urban Extensions in Adjacent Local Authorities).

### Milton Keynes Retail Capacity Update (August 2011)

5.10 The August 2011 Study was prepared to provide a sound evidence base to inform emerging policy and planning decisions. The main reason for its preparation was to update the 2010 Study to reflect the new population forecasts and the reduction in housing numbers, in particular the removal of the South East Strategic Development Area (SE SDA) and the South West Strategic Development Area (SW SDA) which falls in Aylesbury Vale. It provides a useful evidence base for planning application purposes and accordingly the economic information contained within has been used to inform this assessment.

5.11 The Study, on the basis that the City will increase its retention of convenience spending, estimates that by 2016, if identified commitments are in place, there will not be a quantitative need for convenience floorspace up until at least 2026.

5.12 Although not directly relevant on the provision of new convenience floorspace in the urban expansion areas, it is observed that there is general support for addressing local needs. In the Western Expansion Area it advises that any changes to the approved provision would need to be assessed, in particular "consideration would have to be given to the impact of the proposal on the established centres in this area, given that there is a significant oversupply of floorspace the impact could be significant or the result could be that any proposed store would not trade at company averages".

5.13 The findings of this study helped to inform thinking in the design of the neighbourhood centre. With there being no wider need, the scale of the proposed foodstore was limited to that required to meet some of the local needs of the proposed population only.

# 6 Sequential Approach

6.1 As outlined in the previous section, this assessment takes the approach that the preferred option for SWMK is that it should, insofar as reasonably possible, be a self-sufficient community which provides the necessary infrastructure to create a sustainable community.

6.2 In promoting a new retail development in the absence of an up to date development plan, the NPPF states that it is first necessary to have considered the availability of sites in more central locations. However, it is sensible to recognise that in the case of a new centre, where the requirement is identified by policy objectives (Milton Keynes Local Plan, Milton Keynes Core Strategy and the NPPF), it will not usually be necessary to apply the sequential approach to consider whether proposals planned within that new centre could be met in a nearby existing centre.

6.3 In line with best practice and together the objectives of Policy LC1 (New Local Centres) of the Milton Keynes Local Plan 2005 and Policy CS6 (Place-shaping for Sustainable Urban Extensions in Adjacent Local Authorities) of the Milton Keynes Core Strategy 2013, SWMK comprises a new centre. It will be anchored by the small convenience store, together with a few shops which will accommodate a range of smaller retail units including shops, restaurants/café, etc. Alongside the local shops community uses are planned to comprise:

- Commercial floorspace;
- Community centre; and
- Health centre;

6.4 The total land take of the proposed centre will extend to some 0.67 hectares. This infrastructure could not readily be accommodated within another centre nearby and it would be clearly inappropriate to do so as the elements that make up the centre are required to serve the daily needs of the SWMK community.

6.5 In summary, in line with the objectives of the NPPF, the new facilities at the neighbourhood SWMK will cater for day-to-day shopping requirements and community needs. As such it would be inappropriate to locate facilities that seek to serve a localised catchment area elsewhere.

6.6 In light of the above it is considered that the sequential approach has been applied and addressed.

# 7 Impact

7.1 Under the provisions of the NPPF, proposals which are in accordance with an up-to-date development plan strategy will not require an impact assessment. This is because it is expected that this will have been undertaken at the policy formulation stage. With respect to SWMK, the Local Plan is yet to be adopted and there is no retail evidence base which has undertaken any impact work. However as identified in section 5, there is also a size threshold and it is usually only retail proposals of more than 2,500m² where an Impact Assessment is required. It is clear therefore that the limited scale of the retail being proposed in this neighbourhood centre (where the main foodstore is just 480m² gross) means that it falls well below the threshold. As such, a strong argument could be made that a retail impact assessment is not required in this case. Nonetheless, the applicant is keen to ensure that this application is robust. For these reasons this assessment identifies the key impacts prescribed by Paragraph 26 of the NPPF.

7.2 The objective of this impact assessment is to measure and, where possible, quantify the impacts of the proposal. Among other things this will enable any effects on the vitality and viability of existing centres to be identified and assessed.

7.3 As the key element of the SWMK centre is the convenience store, this assessment focuses on convenience goods floorspace. Insofar as the anchor convenience store is concerned, the proposed comparison goods floorspace is limited primarily to a small incidental offer within the convenience store. Accordingly, Westcroft, Bletchley, Milton Keynes and other established destinations are and will continue to be the focus of non-food shopping.

### Paragraph 26 Impact Considerations

7.4 To re-cap, paragraph 26 identifies the main impact considerations which are required to be considered when an impact assessment is undertaken. These are:

- *'the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
- *the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to 10 years from the time the application is made.*

7.5 In this assessment we have focussed our attention on the centres of Westcroft and Bletchley.

7.6 Both criteria of Paragraph 26 are addressed in this assessment. However, the assessment of vitality and viability is undertaken first in order to inform any potential impact on investment.

### Impact on Town Centre Vitality and Viability

7.7 The effect of the proposed development on a town centre's vitality and viability is linked to in-centre turnover and trade diversion and therefore this forms the focus of this assessment.

### Introduction

7.8 This section describes the methodology of the assessment which has been undertaken to assess the economic implications of the proposed convenience floorspace within SWMK. It also assesses its likely trading effect on the vitality and viability of existing defined shopping centres and free-standing stores in the wider area.

7.9 To understand and assist in determining trade draw and turnovers we have reviewed the available evidence base. This includes the 2011 Milton Keynes Retail Capacity Update.

7.10 In particular, the household shopper surveys which underpin these studies have been used to provide evidence on existing shopping patterns in the area. Using such detailed surveys is arguably unnecessary and potentially inappropriate to consider such a small scale proposal, but it does enable there to be consistency with the Milton Keynes study and provides a detailed piece of analysis.

7.11 Using this survey an assessment of the potential trade diversion resulting from the proposed retail provision on convenience goods outlets has been undertaken. Convenience goods primarily comprise food and drink but also include confectionery and tobacco, newspapers and magazines.

7.12 For the purpose of estimating the effect on convenience goods outlets, this assessment follows a conventional approach starting from the identification of base assumptions, an analysis of the demographic and economic profile of the catchment area, with a view to estimating the available expenditure in the catchment area to be spent on convenience goods.

### Estimated Turnover

7.13 An occupier has not yet been sought for the convenience unit. However it is expected that the convenience store will be operated by a national food retailer. Accordingly, the potential turnover of the proposal has been informed by the average company turnovers of likely operators together with its intended role, scale and characteristics of the convenience store.

7.14 For the convenience store we have adopted an annual sales density of £12,000 per square metre as this is representative of the sales density of the leading operators.

7.15 It should be pointed out that the convenience store – which is proposed to anchor the new centre – is not expected to reach its anticipated sales density until several years after 2021. This is because the new population of the proposed development that it seeks to serve will still be growing. However, even once SWMK's population reaches its peak it is likely that the store will not compete with the existing large supermarkets, such as the nearby Morrisons on Wellington Road. To this end, the operator that takes-on the anchor convenience store may have to be content with accepting a turnover lower than a company benchmark typical of its other stores of the same size in a suburban location. Therefore the approach taken in this assessment is robust.

7.16 Table 1 in Appendix 2 shows that the convenience turnover of the proposed foodstore could be some £4.38m per annum on the basis of a national operator, by the time the development is complete.

## Demographic and Economic Assumptions

### Assessment Area

7.17 The Assessment Area has been defined by the assumption that, in line with the 2011 Retail Study, convenience shopping is and should be a localised activity. The Assessment Area is composed of several postal sectors around the application site.

7.18 Regard has been had to the size of store and the role of the neighbourhood centre it will anchor, the location of competing stores, and travel times along the existing and future local road system and rural road networks. The Assessment Area extends to the north, south and east to include part of the more established urban area and to the adjacent rural areas to the west.

7.19 The Assessment Area comprises part of Zones 1 and 2 of the 2011 Retail Study Update. Within this area postal sectors are used to ensure accuracy in population data.

7.20 With respect to the likely trade draw of the convenience store, it should be recognised that no new centre or store will trade in isolation. In reality the proposed centre would not capture all of the spending generated by the new community. Conversely, the new centre could potentially attract very small amounts of spending from a wider area, although these will be limited, having regard to its small local function.

### Base and Design Years

7.21 For the purposes of the impact assessment, we have used a base year of 2014 (the application year).

7.22 Given that the scheme is likely to be substantially implemented at around 2024, we consider this to be appropriate for the final year of assessment. However, it is anticipated that the retail floorspace would be provided earlier to ensure that the prospective residents have access to local shopping facilities to establish sustainable shopping patterns at an early stage. In particular it is anticipated that the convenience store will be open and trading by 2021. In light of this we have considered the proposal on its first year of trading in 2021.

7.23 For reference, other application documents may suggest different time scales. This will be because they relate to the construction of the retail shells rather than their fit out and occupation by a retailer. For a range of reasons, including the need to construct residential units above the retail floorspace, there will be instances where the floorspace is built. However, in reality this floorspace will be a shell awaiting fit out and occupation once the market determines that a business is viable. We are of the view that most of the units in the neighbourhood centre will not be commercially viable until a significant proportion of the population is in place, which is not until about 2021-2024.

### Population and Growth

7.24 Population levels and estimates for established areas of the catchment area have been obtained from the 2011 Retail Study and compared against current census data. In consultation with the project planners, adjustments have been made to allow for the planned population growth. For SWMK it is estimated that the population at the 2024 design year will be approximately 4,749 persons.

7.25 Table 2 of the Economic Tables (Appendix 2) provides the population for the base year 2014, for 2021, and for 2024. Depending on the health of the housing market the resident population is expected to reach approximately half of its total potential by 2021. The population is then expected to progressively grow until 2024 – the year that SWMK is expected to be substantially completed.

### Convenience Expenditure

7.26 Table 3 (Appendix 2) provides information on the level of consumer spending per head in the survey area for convenience goods. This is based on estimates of expenditure obtained from 2011 Retail Study Update. We have adopted the projected long-term expenditure growth rate which, according to Experian Retail Planner, will be up to 0.8% p.a. for convenience goods spending.

7.27 Table 4 (Appendix 2) shows the total convenience expenditure within the Assessment Area. It is projected to increase from £83.21m in 2014 to £112.57m in 2024. Attention should also be drawn to the fact that the new population within SWMK will generate some £5.37m of this in 2021, increasing to £10.16m in 2024 when the development is complete.

### Basic Capacity Analysis

7.28 Before going to undertake detailed analysis of trading turnovers, it is helpful to have regard to the capacity of the new residential development to support the proposed retail element, by considering Tables 1 & 4. The total convenience turnover of the proposed foodstore will be some £4.38m. It can be seen in Table 4 that the new housing in SWMK, which forms the main part of this proposal, will generate some £10.16m once built.

7.29 Even allowing for the majority of convenience expenditure to be attracted to larger stores further afield, the new residents will be able to support their new local convenience store, without there being trade diversion.

7.30 Most practitioners would consider that no further analysis would be required when considering a neighbourhood centre such as this. However, for completeness, this chapter goes on to research trade distribution in the wider area.

### Trade Distribution at the Base Year

7.31 In order to assess the effect on trade as a result of SWMK, it is first necessary to analyse the current turnover of existing stores and centres within the catchment area. It is also necessary to understand those stores outside the study area that draw spending from within the defined catchment area.

7.32 Calculation of the base year (2014) convenience goods turnover of existing stores is derived by allocating available convenience goods expenditure in each catchment area zone to a convenience store. The household shopper surveys provide a guide as to current shopping patterns in the Assessment Area and the results have been used to estimate the retail turnovers of stores serving the Assessment Area at the base year of 2014. This is undertaken by combining the estimates of total available expenditure in the survey area with the information on spending patterns provided by the available evidence base. It should be pointed out that various adjustments to the market shares need to be made to allow for the inherent limitations of the evidence base. This is set out in Tables 5 and 6 which are included at Appendix 2.

7.33 An assumption is then made for the percentage of trade draw to an individual store derived from outside the Assessment Area, i.e. inflow. This is added to the trade draw of the store derived from within the area to give the total turnover of the store.

### Trade Distribution at the Design Years

7.34 Account is then taken of changes in store performance between the base year (2014) and both 2021 and 2024 by distributing spending growth in line with the market share. This process simply allocates and distributes spending growth to existing stores in the same proportion as the base year spending. In other words we have applied a fixed market share approach. Tables 7 and 8 of the assessment tables (**Appendix 2**) take fixed market share analysis through to 2021 without SWMK. Tables 9 and 10 do the same, but with the SWMK proposal in 2021, when the residential element would be half built and the convenience store might have first opened. This stage introduces the development into the model and adjusts market shares to allow for the proposal.

### Trading Effects of the Proposal in 2021

7.35 Before having regard to the potential expenditure diversion to the proposed development in quantitative terms, it is important to note that the pattern of shopping behaviour predicted for the catchment area is based, in part, on the empirical evidence provided by the household shopper surveys. Analysis of this data reveals existing patterns of spending from which judgements can be made as to how the pattern of trade will be altered by the introduction of the convenience store located in a new centre. This exercise is assisted by experience of market penetration and studies elsewhere, our on-the-ground observations, and assessment techniques used by Jones Lang LaSalle based on many years of experience of this type of economic assessment.

7.36 It is also important to recognise that, in areas like Milton Keyes with good road networks, for those that have a car, the large supermarkets will still draw a significant amount of trade from the new households. However, top-up secondary trips by these households are less likely to be affected by competition from large supermarkets particularly because they tend to be short distance journeys and large convenience stores generally offer little advantage for top-up trips unless they are more conveniently located than the neighbourhood centre or corner shop. Those without a car are more likely to undertake all of their convenience shopping locally.

7.37 The figures are all pulled together in Table 11, which assess the impact of the proposal, by comparing turnovers with and without the development at South West Milton Keynes as a whole.

7.38 The fifth numerical column shows whether there would be a positive or negative impact as at 2021 as a result of the proposal. It can be seen that all the other small scale convenience stores in both Bletchley and in Winslow would remain broadly unchanged. Of these, only the Tesco Express on Melrose Avenue in Bletchley, would actually have a negative impact, but only 0.3%, which would be virtually imperceptible. Indeed, by looking at the final numerical column, it can be seen that by comparing the turnovers in 2014 to 2021, all the local stores within the assessment area, including the Tesco in Bletchley actually increase their turnover by between 12% and 14%.

7.39 The larger stores have no negative impacts and indeed, enjoy an even greater uplift in trade than would otherwise be the case, by virtue of the fact that some of the new population within South West Milton Keynes would also frequent these larger stores, thereby bolstering their turnover, as can be seen from Table 11 in Appendix 2. Examples of the changes in trade in the smaller local shops is shown in the table below.

Table C: Examples of changes in Trade at 2021 with SWMK

| Store | Turnover 2014 £m | Projected Turnover 2021* £m | Impact at 2021 (+ or -) % | Change 2014 – 2021 (+ or - ) |
|---|---|---|---|---|
| Morrisons Westcroft | 73.59 | 87.57 | +3.05% | +15.97% |
| Tesco Express, Melrose Avenue | 4.79 | 5.53 | -0.30% | +13.41% |
| Co – op Winslow | 0.19 | 0.22 | +0.51% | +12.30% |
| Tesco Express, Buckingham Road | 4.09 | 4.76 | +0.51% | +13.99% |

7.40 It can be concluded from this more detailed analysis that in 2021, when the proposed convenience store may first open, that there be no perceptible impact on existing stores and indeed, all will increase their turnovers significantly over this period.

### Trading Effects of the Proposal in 2024

7.41 A third and final stage of analysis has been undertaken to assess the position in 2024, which is when the development of SWMK is complete and the proposed convenience store within the neighbourhood centre is anticipated to have reached its full trading capacity as a result.

7.42 The methodology followed is the same as in 2021. Table 12 sets out the position without the SWMK development. Table 13 assesses the position with SWMK. The resultant impacts are analysed in Table 14.

7.43 The fifth numerical column in Table 14 which looks at the impact in 2024, shows that when the proposed convenience store within the neighbourhood centre will have reached its full trading capacity, there would be no negative impacts and indeed, it can be seen from the final column in Table 14, that by looking at the change over the period, all the local shops will have increased their turnovers by some 19%-20%. Again, the larger stores will benefit disproportionally from the additional population and their turnovers will have improved by some 22%-26% in the majority of cases.

7.44 It can therefore be concluded that even once the proposed convenience store reaches its full trading capacity, there will be no perceptible negative impact on existing food stores.

7.45 It is clear that the limited scale of convenience development being proposed as part of the SWMK development will primarily serve the needs of its own residents, without having a wider function that would have a detrimental impact on existing convenience stores elsewhere.

### Effect on Existing Committed and Planned Public and Private Investment

7.46 No sites in the catchment area are allocated for foodstore development. We have not identified any planned investment in new convenience stores in any town centres in the Assessment Area.

7.47 It is also understood from a review of publicly available information that there are no town centre strategies identified through a local development framework or development plan that rely on planned public or private investments.

7.48 Nonetheless, should investment come forward in the future, on the basis the limited scale of the convenience store that forms part of the SWMK proposal, it is considered that it would not limit the scope for further retail development and investment in any centre. The analysis of the proposal's affect on viability and vitality reinforces this view. This is because it has specifically been designed to be of a small scale to meet the local needs of the new residents, without having a wider function.

# 8 Summary and Conclusions

8.1 This report has considered the retail proposals associated with the urban extension at SWMK and has assessed the impact of the convenience store that will anchor the proposed centre and address the needs of the new community. This report addresses the sequential test and analyses the potential impacts on surrounding stores and centres.

8.2 The neighbourhood centre will provide a range of community infrastructure and facilities to ensure the delivery of a sustainable mixed use development of sufficient critical mass and diversity to meet the requirements and expectations of the new community. The inclusion of food shopping facilities will enable residents to make local shopping trips, which reduce the need for car travel.

8.3 The location and scale of the proposed retail provision is in keeping with the objectives of the NPPF. The NPPF acknowledges the necessity to provide the required infrastructure to address qualitative and qualitative need by aligning retail requirements with local needs.

8.4 The proposed retail provision in the form of a new neighbourhood centre is required to support and address local needs arising from the SWMK urban extension.

8.5 Locating the neighbourhood centre elsewhere would not meet the infrastructure needs locally and it would clearly be inappropriate to attempt to serve the daily needs of the SWMK community in a different location somewhere else. The retail element within the neighbourhood centre will only come forward as part of the SWMK development as a whole. It forms part of the same application. It will therefore not be built if the urban extension is not permitted. As such, it is considered that the sequential approach has been applied and addressed.

8.6 The basic capacity analysis undertaken and described in the early part of Chapter 7, demonstrates that the new residential development will, on its own, support the proposed retail element. The total convenience turnover of the proposed food store will be some £4.38 million. The new housing in SWMK which forms part of this proposal will generate some £10.16 million of convenience expenditure once built. It is therefore clear that even allowing for the majority of convenience expenditure to be attracted to larger stores further afield, the new urban extension will be able to support their local convenience store without any trade diversion.

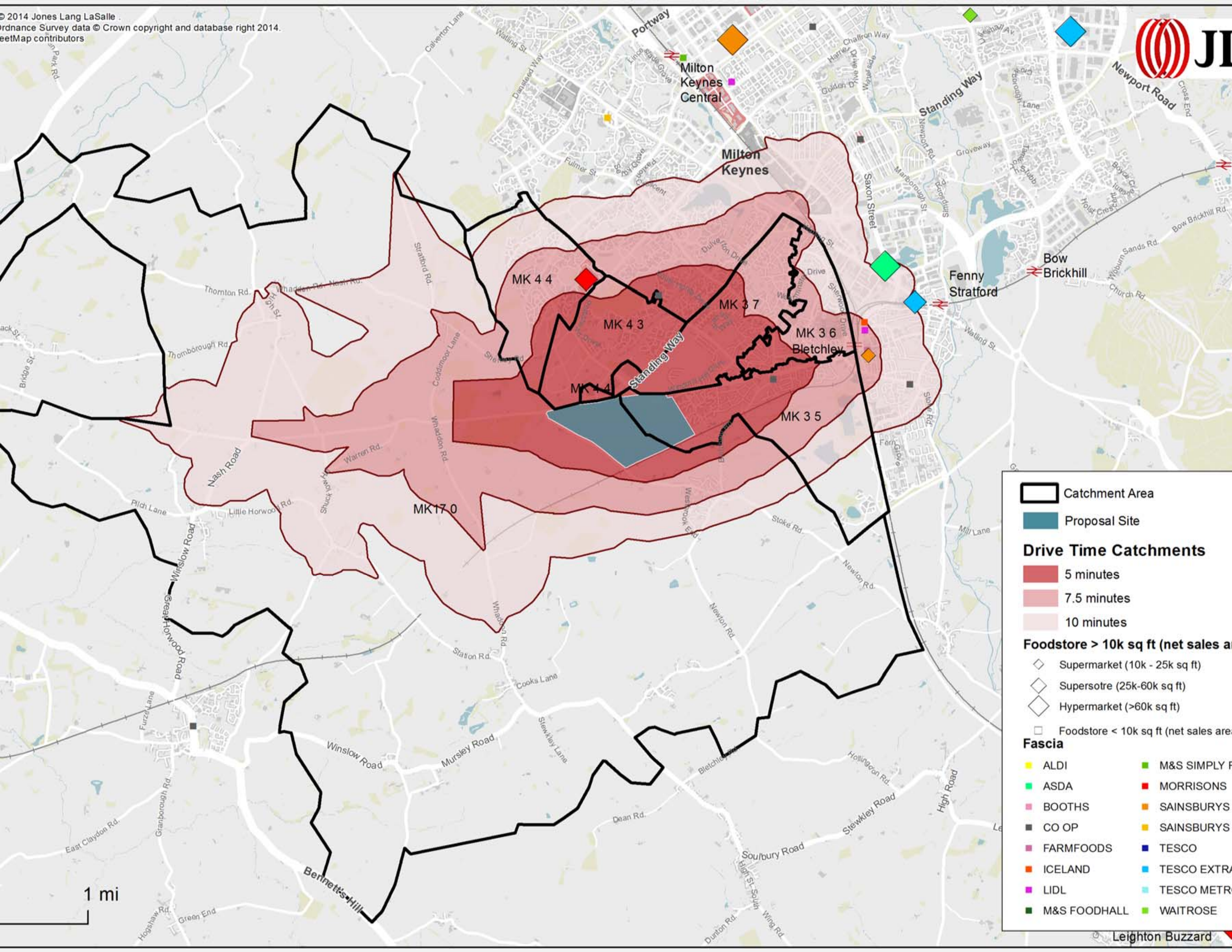
8.7 Nonetheless, a further stage of detailed analysis has been undertaken utilising the shopping patterns revealed by the telephone survey that was commissioned as part of the Council's 2011 Retail Study Update. The conclusions of this more detailed analysis demonstrates that in both 2021 and in 2024 when the development is complete, the impact that the convenience element of the proposals would have on other local shops, would be imperceptible. Indeed, their turnovers will increase substantially between 2014 and 2021/2024 by some 12% and 19% respectively. The turnover of larger stores will increase by an even greater amount, as they will benefit from those in the new development area who chose to undertake some of their main food shopping within the larger supermarkets.

8.8 The analysis undertaken demonstrates that the proposal will not have a detrimental impact on existing or planned investment now or in the future. It also confirms that the neighbourhood centre is of an appropriate local scale to meet the needs of the new community, without having a wider effect.

8.9 Accordingly, it is considered that the retail element of the proposal is consistent with the adopted and emerging development plan and the NPPF and will secure a sustainable pattern of development that meets local need without adversely impacting on the existing centres.

# Appendix 1 – Assessment Area Plan


© 2014 Jones Lang LaSalle .
Ordnance Survey data © Crown copyright and database right 2014.
Milton Keynes Central
Milton Keynes
Fenny Stratford
Bow Brickhill
Bletchley
Leighton Buzzard
MK 4 4
MK 4 3
MK 3 7
MK 3 6
MK 3 5
MK17 0
Standing Way
Newport Road
Portway
Saxon Street
Nash Road
Winslow Road
Great Horwood Road
Mursley Road
Soulbury Road
Stewkley Road
Bennett's Hill
1 mi
Catchment Area
Proposal Site
Drive Time Catchments
5 minutes
7.5 minutes
10 minutes
Supermarket (10k - 25k sq ft)
Supersotre (25k-60k sq ft)
Hypermarket (>60k sq ft)
Fascia
ALDI
ASDA
BOOTHS
CO OP
FARMFOODS
ICELAND
LIDL
M&S FOODHALL
MORRISONS
SAINSBURYS
SAINSBURYS
TESCO
WAITROSE

# Appendix 2 – Retail Impact Assessment Tables

**PROPOSAL**

**Table 1**

| | |
|---|---|
| Neighbourhood Centre | |
| | |
| Convenience store | |
| Gross floorspace m2 | 480 |
| Net convenience floorspace m2 | 365 |
| Expected sales density per m2 | £12,000 |
| Anticipated turnover once SWMK is complete | £4,380,000 |

## ASSESSMENT AREA POPULATION

**Table 2**

| | | | | | | | | | | | | | Growth | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Zone** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** | **2013 - 2021** | **2021-2024** | **2013-2024** |
| MK17 0 | 6,157 | 6,227 | 6,297 | 6,367 | 6,437 | 6,507 | 6,567 | 6,627 | 6,688 | 6,748 | 6,808 | 6,919 | 8.6% | 3.5% | 12.4% |
| MK3 5 | 6,520 | 6,620 | 6,721 | 6,821 | 6,922 | 7,022 | 7,109 | 7,195 | 7,282 | 7,368 | 7,455 | 7,566 | 11.7% | 3.9% | 16.1% |
| MK3 6 | 6,323 | 6,422 | 6,521 | 6,619 | 6,718 | 6,817 | 6,902 | 6,987 | 7,071 | 7,156 | 7,241 | 7,352 | 11.8% | 4.0% | 16.3% |
| MK3 7 | 10,634 | 10,797 | 10,960 | 11,124 | 11,287 | 11,450 | 11,592 | 11,734 | 11,875 | 12,017 | 12,159 | 12,270 | 11.7% | 3.3% | 15.4% |
| MK4 3 | 3,905 | 3,968 | 4,032 | 4,095 | 4,159 | 4,222 | 4,273 | 4,324 | 4,376 | 4,427 | 4,478 | 4,589 | 12.1% | 4.9% | 17.5% |
| MK4 4 | 7,730 | 7,793 | 7,857 | 7,920 | 7,984 | 8,368 | 8,419 | 8,470 | 8,522 | 8,573 | 8,893 | 9,004 | 10.2% | 5.7% | 16.5% |
| SWMK | | | | | | 320 | 960 | 1,766 | 2,573 | 3,379 | 4,186 | 4,749 | | | |
| Total | **41,269** | **41,828** | **42,387** | **42,947** | **43,506** | **44,706** | **45,822** | **47,104** | **48,386** | **49,668** | **51,220** | **52,452** | 17.2% | 8.4% | 27.1% |

**Notes/Sources:**

1. CACI (2011 mid year government projections), Milton Keynes Retail Study 2011 and David Lock and Associates.
2. Population for SWMK is based on an average household size of 2.56 persons.
3. Total planned households for SWMK is 1,855.
4. Post 2023 growth is at 5% in line with Milton Keynes Retail Study 2011 and then 1% per year thereafter.

## CONVENIENCE RETAIL EXPENDITURE PER HEAD

**Table 3**

| Zone | 2014 | 2021 | 2024 |
|---|---|---|---|
| MK17 0 | £1,994 | £2,106 | £2,157 |
| MK3 5 | £1,983 | £2,089 | £2,139 |
| MK3 6 | £1,983 | £2,089 | £2,139 |
| MK3 7 | £1,983 | £2,089 | £2,139 |
| MK4 3 | £2,000 | £2,106 | £2,157 |
| MK4 4 | £2,000 | £2,106 | £2,157 |
| SWMK | £1,983 | £2,089 | £2,139 |

**Notes/Sources:**

1. 2011 Study spending (table 2) until 2016 then Experian Retail Planner 11 October 2013
2. Assumes annual growth rate of 0.8% Experian Retail Planner Briefing Note 11 Table 3
3. Price base from 2011 Study

## CONVENIENCE GOODS EXPENDITURE (£)

**Table 4**

| Expenditure - All Convenience Goods | | | |
|---|---|---|---|
| **Zone** | **2014** | **2021** | **2024** |
| MK17 0 | £12,416,638 | £14,085,863 | £14,926,809 |
| MK3 5 | £13,128,253 | £15,208,584 | £16,185,435 |
| MK3 6 | £12,734,429 | £14,769,148 | £15,727,667 |
| MK3 7 | £21,410,848 | £24,802,661 | £26,247,774 |
| MK4 3 | £7,936,800 | £9,216,176 | £9,900,482 |
| MK4 4 | £15,586,800 | £17,948,754 | £19,424,616 |
| SWMK | £0 | £5,373,485 | £10,158,171 |
| Total exc SWMK | **£83,213,768** | **£96,031,187** | **£102,412,782** |
| Total with SWMK | **£83,213,768** | **£101,404,672** | **£112,570,953** |

**Notes/Sources:**

1. Table 2 and Table 3

**Market Share - All Convenience Goods 2014**

**Table 5**

| Stores | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 |
|---|---|---|---|---|---|---|
| SWMK Neighbourhood Centre | | | | | | |
| Morrisons Westcroft | 15.50% | 11.70% | 11.70% | 11.70% | 34.00% | 34.00% |
| Tesco Express Bletchley Buckingham Road | 0.50% | 2.60% | 2.60% | 3.20% | 2.40% | 2.80% |
| Tesco Express Bletchley Melrose Avenue | 0.00% | 3.60% | 3.60% | 3.50% | 1.00% | 1.00% |
| Co-op Newton Road, Bletchley | 0.00% | 1.80% | 1.80% | 1.00% | 0.00% | 0.00% |
| Co-op Bowland Drive, Emerson Valley | 0.00% | 0.70% | 0.70% | 1.00% | 0.70% | 0.00% |
| Co-op High St Winslow | 1.40% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Budgens Winslow | 1.40% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Other stores | 1.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| | | | | | | |
| **Outside Assessment Area** | | | | | | |
| Sainsbury's Bletchley | 7.00% | 17.80% | 17.80% | 17.80% | 3.00% | 3.00% |
| Tesco Extra, Bletchley | 4.80% | 36.20% | 36.20% | 36.20% | 19.70% | 19.70% |
| Asda Wal-Mart, Bletchley | 4.40% | 9.30% | 9.30% | 9.30% | 9.60% | 9.60% |
| Lidl, Princess Way, Bletchley | 0.50% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Iceland Bletchley | 0.50% | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% |
| Aldi Bletchley | 0.50% | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% |
| Tesco Extra, Kingston | 1.00% | 2.00% | 2.00% | 2.00% | 6.70% | 6.70% |
| Sainsbury's, Milton Keynes Central | 1.70% | 3.50% | 3.50% | 3.50% | 8.50% | 8.50% |
| Waitrose Milton Keynes Central | 2.00% | 2.60% | 2.60% | 2.60% | 0.50% | 0.50% |
| Marks and Spencer Milton Keynes Central | 2.00% | 0.00% | 0.00% | 0.00% | 1.40% | 1.40% |
| Tesco Express, Oldbrook Boulevard | 0.00% | 0.00% | 0.00% | 0.00% | 0.20% | 0.20% |
| Tesco, McConnell Drive, Wolverton | 0.00% | 2.00% | 2.00% | 2.00% | 2.00% | 2.00% |
| Netto, Glyn Sq Wolverton | 0.00% | 0.00% | 0.00% | 0.00% | 1.10% | 1.10% |
| Tesco Buckingham | 44.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Tesco Express, Buckingham | 2.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Waitrose Buckingham | 2.60% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| | | | | | | |
| Other Locations | 7.20% | 4.20% | 4.20% | 4.20% | 7.20% | 7.50% |
| | | | | | | |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

**Notes / Sources**

1. 2009 Aylesbury Vale District Council Retail Study
2. Household survey for 2011 Milton Keynes Retail Study
3. The results are weighted towards the 2011 Study and adjustments made to allow for store openings and closures and on ground observations

**Expenditure Distribution / Market Share by Zone 2014**

**Table 6**

| | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 | SWMK | Total Trade from Assessment area | % of turnover from Assessment area | Total T/O |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total Expenditure** | **£12,416,638** | **£13,128,253** | **£12,734,429** | **£21,410,848** | **£7,936,800** | **£15,586,800** | **£0** | | | |
| SWMK Neighbourhood Centre | | | | | | | | | | |
| Morrisons Westcroft | £1,924,579 | £1,536,006 | £1,489,928 | £2,505,069 | £2,698,512 | £5,299,512 | £0 | £15,453,606 | 21% | £73,588,600 |
| Tesco Express Bletchley Buckingham Road | £62,083 | £341,335 | £331,095 | £685,147 | £190,483 | £436,430 | £0 | £2,046,574 | 50% | £4,093,147 |
| Tesco Express Bletchley Melrose Avenue | £0 | £472,617 | £458,439 | £749,380 | £79,368 | £155,868 | £0 | £1,915,672 | 40% | £4,789,181 |
| Co-op Newton Road, Bletchley | £0 | £236,309 | £229,220 | £214,108 | £0 | £0 | £0 | £679,637 | 45% | £1,510,304 |
| Co-op Bowland Drive, Emerson Valley | £0 | £91,898 | £89,141 | £214,108 | £55,558 | £0 | £0 | £450,705 | 35% | £1,287,728 |
| Co-op High St Winslow | £173,833 | £0 | £0 | £0 | £0 | £0 | £0 | £173,833 | 90% | £193,148 |
| Budgens Winslow | £173,833 | £0 | £0 | £0 | £0 | £0 | £0 | £173,833 | 90% | £193,148 |
| Other stores | £124,166 | £0 | £0 | £0 | £0 | £0 | £0 | £124,166 | 90% | £137,963 |
| **Outside Assessment Area** | | | | | | | | | | |
| Sainsbury's Bletchley | £869,165 | £2,336,829 | £2,266,728 | £3,811,131 | £238,104 | £467,604 | £0 | £9,989,561 | 45% | £22,199,025 |
| Tesco Extra, Bletchley | £595,999 | £4,752,428 | £4,609,863 | £7,750,727 | £1,563,550 | £3,070,600 | £0 | £22,343,166 | 41% | £54,495,526 |
| Asda Wal-Mart, Bletchley | £546,332 | £1,220,928 | £1,184,302 | £1,991,209 | £761,933 | £1,496,333 | £0 | £7,201,036 | 17% | £42,359,035 |
| Lidl, Princess Way, Bletchley | £62,083 | £0 | £0 | £0 | £0 | £0 | £0 | £62,083 | 20% | £310,416 |
| Iceland Bletchley | £62,083 | £131,283 | £127,344 | £214,108 | £79,368 | £155,868 | £0 | £770,054 | 20% | £3,850,272 |
| Aldi Bletchley | £62,083 | £131,283 | £127,344 | £214,108 | £79,368 | £155,868 | £0 | £770,054 | 20% | £3,850,272 |
| Tesco Extra, Kingston | £124,166 | £262,565 | £254,689 | £428,217 | £531,766 | £1,044,316 | £0 | £2,645,718 | 3% | £88,190,606 |
| Sainsbury's, Milton Keynes Central | £211,083 | £459,489 | £445,705 | £749,380 | £674,628 | £1,324,878 | £0 | £3,865,162 | 8% | £48,314,530 |
| Waitrose Milton Keynes Central | £248,333 | £341,335 | £331,095 | £556,682 | £39,684 | £77,934 | £0 | £1,595,063 | 7% | £22,786,608 |
| Marks and Spencer Milton Keynes Central | £248,333 | £0 | £0 | £0 | £111,115 | £218,215 | £0 | £577,663 | 11% | £5,251,483 |
| Tesco Express, Oldbrook Boulevard | £0 | £0 | £0 | £0 | £15,874 | £31,174 | £0 | £47,047 | 1% | £4,704,720 |
| Tesco, McConnell Drive, Wolverton | £0 | £262,565 | £254,689 | £428,217 | £158,736 | £311,736 | £0 | £1,415,943 | 1% | £141,594,260 |
| Netto, Glyn Sq Wolverton | £0 | £0 | £0 | £0 | £87,305 | £171,455 | £0 | £258,760 | 7% | £3,696,566 |
| Tesco Buckingham | £5,463,321 | £0 | £0 | £0 | £0 | £0 | £0 | £5,463,321 | 54% | £10,117,261 |
| Tesco Express Buckingham | £248,333 | £0 | £0 | £0 | £0 | £0 | £0 | £248,333 | 10% | £2,483,328 |
| Waitrose Buckingham | £322,833 | £0 | £0 | £0 | £0 | £0 | £0 | £322,833 | 11% | £2,934,842 |
| Other Locations | £893,998 | £551,387 | £534,846 | £899,256 | £571,450 | £1,169,010 | £0 | £4,619,946 | | £4,619,946 |
| **Totals** | **£12,416,638** | **£13,128,253** | **£12,734,429** | **£21,410,848** | **£7,936,800** | **£15,586,800** | **£0** | **£83,213,768** | | |

**Notes / Sources**

1. Inflow/outflow from MK Study and AVDC study and adjusted to allow for store openings.
2. Inflow by comparing total store turnover by turnover within catchment area

**Market Share - All Convenience Goods 2021 and 2024 WITHOUT SWMK development**

**Table 7**

| **Stores** | **MK17 0** | **MK3 5** | **MK3 6** | **MK3 7** | **MK4 3** | **MK4 4** |
|---|---|---|---|---|---|---|
| SWMK Neighbourhood Centre | | | | | | |
| Morrisons Westcroft | 15.50% | 11.70% | 11.70% | 11.70% | 34.00% | 34.00% |
| Tesco Express Bletchley Buckingham Road | 0.50% | 2.60% | 2.60% | 3.20% | 2.40% | 2.80% |
| Tesco Express Bletchley Melrose Avenue | 0.00% | 3.60% | 3.60% | 3.50% | 1.00% | 1.00% |
| Co-op Newton Road, Bletchley | 0.00% | 1.80% | 1.80% | 1.00% | 0.00% | 0.00% |
| Co-op Bowland Drive, Emerson Valley | 0.00% | 0.70% | 0.70% | 1.00% | 0.70% | 0.00% |
| Co-op High St Winslow | 1.40% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Budgens Winslow | 1.40% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Other stores | 1.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| | | | | | | |
| **Outside Assessment Area** | | | | | | |
| Sainsbury's Bletchley | 7.00% | 17.80% | 17.80% | 17.80% | 3.00% | 3.00% |
| Tesco Extra, Bletchley | 4.80% | 36.20% | 36.20% | 36.20% | 19.70% | 19.70% |
| Asda Wal-Mart, Bletchley | 4.40% | 9.30% | 9.30% | 9.30% | 9.60% | 9.60% |
| Lidl, Princess Way, Bletchley | 0.50% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Iceland Bletchley | 0.50% | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% |
| Aldi Bletchley | 0.50% | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% |
| Tesco Extra, Kingston | 1.00% | 2.00% | 2.00% | 2.00% | 6.70% | 6.70% |
| Sainsbury's, Milton Keynes Central | 1.70% | 3.50% | 3.50% | 3.50% | 8.50% | 8.50% |
| Waitrose Milton Keynes Central | 2.00% | 2.60% | 2.60% | 2.60% | 0.50% | 0.50% |
| Marks and Spencer Milton Keynes Central | 2.00% | 0.00% | 0.00% | 0.00% | 1.40% | 1.40% |
| Tesco Express, Oldbrook Boulevard | 0.00% | 0.00% | 0.00% | 0.00% | 0.20% | 0.20% |
| Tesco, McConnell Drive, Wolverton | 0.00% | 2.00% | 2.00% | 2.00% | 2.00% | 2.00% |
| Netto, Glyn Sq Wolverton | 0.00% | 0.00% | 0.00% | 0.00% | 1.10% | 1.10% |
| Tesco Buckingham | 44.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Tesco Express, Buckingham | 2.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Waitrose Buckingham | 2.60% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| | | | | | | |
| Other Locations | 7.20% | 4.20% | 4.20% | 4.20% | 7.20% | 7.50% |
| | | | | | | |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

**Notes / Sources**

1. 2009 Aylesbury Vale District Council Retail Study
2. 2011 Milton Keynes Retail Study
3. In all but Zone MK17 0 the results are weighted towards the 2011 Study and adjustments made to allow for store openings and closures and on ground observations

**Expenditure Distribution / Market Share by Zone 2021 - WITHOUT SWMK development**

**Table 8**

| | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 | SWMK | Total Trade from Catchment | % of turnover from Assessment area | Total T/O |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total Expenditure** | **£14,085,863** | **£15,208,584** | **£14,769,148** | **£24,802,661** | **£9,216,176** | **£17,948,754** | **£0** | | | |
| SWMK Neighbourhood Centre | | | | | | | | | | |
| Morrisons Westcroft | £2,183,309 | £1,779,404 | £1,727,990 | £2,901,911 | £3,133,500 | £6,102,576 | £0 | £17,828,691 | 21% | £84,898,530 |
| Tesco Express Bletchley Buckingham Road | £70,429 | £395,423 | £383,998 | £793,685 | £221,188 | £502,565 | £0 | £2,367,289 | 50% | £4,734,578 |
| Tesco Express Bletchley Melrose Avenue | £0 | £547,509 | £531,689 | £868,093 | £92,162 | £179,488 | £0 | £2,218,941 | 40% | £5,547,352 |
| Co-op Newton Road, Bletchley | £0 | £273,755 | £265,845 | £248,027 | £0 | £0 | £0 | £787,626 | 45% | £1,750,280 |
| Co-op Bowland Drive, Emerson Valley | £0 | £106,460 | £103,384 | £248,027 | £64,513 | £0 | £0 | £522,384 | 35% | £1,492,526 |
| Co-op High St Winslow | £197,202 | £0 | £0 | £0 | £0 | £0 | £0 | £197,202 | 90% | £219,113 |
| Budgens Winslow | £197,202 | £0 | £0 | £0 | £0 | £0 | £0 | £197,202 | 90% | £219,113 |
| Other stores | £140,859 | £0 | £0 | £0 | £0 | £0 | £0 | £140,859 | 90% | £156,510 |
| **Outside Assessment Area** | | | | | | | | | | |
| Sainsbury's Bletchley | £986,010 | £2,707,128 | £2,628,908 | £4,414,874 | £276,485 | £538,463 | £0 | £11,551,868 | 45% | £25,670,818 |
| Tesco Extra, Bletchley | £676,121 | £5,505,507 | £5,346,432 | £8,978,563 | £1,815,587 | £3,535,905 | £0 | £25,858,115 | 41% | £63,068,573 |
| Asda Wal-Mart, Bletchley | £619,778 | £1,414,398 | £1,373,531 | £2,306,647 | £884,753 | £1,723,080 | £0 | £8,322,188 | 17% | £48,954,046 |
| Lidl, Princess Way, Bletchley | £70,429 | £0 | £0 | £0 | £0 | £0 | £0 | £70,429 | 20% | £352,147 |
| Iceland Bletchley | £70,429 | £152,086 | £147,691 | £248,027 | £92,162 | £179,488 | £0 | £889,883 | 20% | £4,449,413 |
| Aldi Bletchley | £70,429 | £152,086 | £147,691 | £248,027 | £92,162 | £179,488 | £0 | £889,883 | 20% | £4,449,413 |
| Tesco Extra, Kingston | £140,859 | £304,172 | £295,383 | £496,053 | £617,484 | £1,202,567 | £0 | £3,056,517 | 3% | £101,883,895 |
| Sainsbury's, Milton Keynes Central | £239,460 | £532,300 | £516,920 | £868,093 | £783,375 | £1,525,644 | £0 | £4,465,793 | 8% | £55,822,407 |
| Waitrose Milton Keynes Central | £281,717 | £395,423 | £383,998 | £644,869 | £46,081 | £89,744 | £0 | £1,841,832 | 7% | £26,311,888 |
| Marks and Spencer Milton Keynes Central | £281,717 | £0 | £0 | £0 | £129,026 | £251,283 | £0 | £662,026 | 11% | £6,018,421 |
| Tesco Express, Oldbrook Boulevard | £0 | £0 | £0 | £0 | £18,432 | £35,898 | £0 | £54,330 | 1% | £5,432,986 |
| Tesco, McConnell Drive, Wolverton | £0 | £304,172 | £295,383 | £496,053 | £184,324 | £358,975 | £0 | £1,638,906 | 1% | £163,890,647 |
| Netto, Glyn Sq Wolverton | £0 | £0 | £0 | £0 | £101,378 | £197,436 | £0 | £298,814 | 7% | £4,268,775 |
| Tesco Buckingham | £6,197,780 | £0 | £0 | £0 | £0 | £0 | £0 | £6,197,780 | 54% | £11,477,370 |
| Tesco Express Buckingham | £281,717 | £0 | £0 | £0 | £0 | £0 | £0 | £281,717 | 10% | £2,817,173 |
| Waitrose Buckingham | £366,232 | £0 | £0 | £0 | £0 | £0 | £0 | £366,232 | 11% | £3,329,386 |
| Other Locations | £1,014,182 | £638,761 | £620,304 | £1,041,712 | £663,565 | £1,346,157 | £0 | £5,324,680 | | £5,324,680 |
| **Totals** | **£14,085,863** | **£15,208,584** | **£14,769,148** | **£24,802,661** | **£9,216,176** | **£17,948,754** | **£0** | **£96,031,187** | | |

**Notes / Sources**

1. Inflow/outflow from MK Study and AVDC study and adjusted to allow for store openings.
2. Inflow by comparing total store turnover by turnover within catchment area.

**Market Share - All Convenience Goods 2021 and 2024 with SWMK Development**

**Table 9**

| Stores | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 | SWMK |
|---|---|---|---|---|---|---|---|
| SWMK Neighbourhood Centre | 0.50% | 0.50% | 0.00% | 0.25% | 0.25% | 0.10% | 40.00% |
| Morrisons Westcroft | 15.25% | 11.70% | 11.70% | 11.65% | 33.80% | 33.90% | 12.00% |
| Tesco Express Bletchley Buckingham Road | 0.45% | 2.55% | 2.60% | 3.20% | 2.40% | 2.80% | 0.50% |
| Tesco Express Bletchley Melrose Avenue | 0.00% | 3.55% | 3.60% | 3.45% | 1.00% | 1.00% | 0.25% |
| Co-op Newton Road, Bletchley | 0.00% | 1.75% | 1.80% | 1.00% | 0.00% | 0.00% | 0.15% |
| Co-op Bowland Drive, Emerson Valley | 0.00% | 0.70% | 0.70% | 1.00% | 0.65% | 0.00% | 0.10% |
| Co-op High St Winslow | 1.35% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.15% |
| Budgens Winslow | 1.35% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.15% |
| Other stores | 0.95% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.20% |
| | | | | | | | |
| **Outside Assessment Area** | | | | | | | |
| Sainsbury's Bletchley | 7.00% | 17.70% | 17.80% | 17.75% | 3.00% | 3.00% | 10.00% |
| Tesco Extra, Bletchley | 4.80% | 36.10% | 36.20% | 36.15% | 19.70% | 19.70% | 15.00% |
| Asda Wal-Mart, Bletchley | 4.40% | 9.20% | 9.30% | 9.25% | 9.60% | 9.60% | 6.00% |
| Lidl, Princess Way, Bletchley | 0.50% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.10% |
| Iceland Bletchley | 0.50% | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% | 0.50% |
| Aldi Bletchley | 0.50% | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% | 0.50% |
| Tesco Extra, Kingston | 1.00% | 2.00% | 2.00% | 2.00% | 6.70% | 6.70% | 1.40% |
| Sainsbury's, Milton Keynes Central | 1.70% | 3.50% | 3.50% | 3.50% | 8.50% | 8.50% | 2.00% |
| Waitrose Milton Keynes Central | 2.00% | 2.60% | 2.60% | 2.60% | 0.50% | 0.50% | 2.00% |
| Marks and Spencer Milton Keynes Central | 2.00% | 0.00% | 0.00% | 0.00% | 1.40% | 1.40% | 0.50% |
| Tesco Express, Oldbrook Boulevard | 0.00% | 0.00% | 0.00% | 0.00% | 0.20% | 0.20% | 0.00% |
| Tesco, McConnell Drive, Wolverton | 0.00% | 2.00% | 2.00% | 2.00% | 2.00% | 2.00% | 1.00% |
| Netto, Glyn Sq Wolverton | 0.00% | 0.00% | 0.00% | 0.00% | 1.10% | 1.10% | 0.00% |
| Tesco Buckingham | 44.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 2.50% |
| Tesco Express, Buckingham | 2.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Waitrose Buckingham | 2.60% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| | | | | | | | |
| Other Locations | 7.15% | 4.15% | 4.20% | 4.20% | 7.20% | 7.50% | 5.00% |
| | | | | | | | |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

**Notes / Sources**

1. Household survey for 2005 Revised Aylesbury Vale District Council
2. Household survey for 2008 Milton Keynes Retail Needs Assessment Study
3. the results are blended and adjustments made to allow for new store openings and closures and on ground observations

**Expenditure Distribution / Market Share by Zone 2021 with SWMK development**

**Table 10**

| | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 | SWMK | Total Trade from Assesment Area | % of turnover from Assessment Area | Total T/O |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total Expenditure** | **£14,085,863** | **£15,208,584** | **£14,769,148** | **£24,802,661** | **£9,216,176** | **£17,948,754** | **£5,373,485** | | | |
| SWMK Neighbourhood Centre | £70,429 | £76,043 | £0 | £62,007 | £23,040 | £17,949 | £2,149,394 | £2,398,862 | 98% | £2,447,819 |
| Morrisons Westcroft | £2,148,094 | £1,779,404 | £1,727,990 | £2,889,510 | £3,115,068 | £6,084,628 | £644,818 | £18,389,512 | 21% | £87,569,106 |
| Tesco Express Bletchley Buckingham Roa( | £63,386 | £387,819 | £383,998 | £793,685 | £221,188 | £502,565 | £26,867 | £2,379,509 | 50% | £4,759,018 |
| Tesco Express Bletchley Melrose Avenue | £0 | £539,905 | £531,689 | £855,692 | £92,162 | £179,488 | £13,434 | £2,212,369 | 40% | £5,530,922 |
| Co-op Newton Road, Bletchley | £0 | £266,150 | £265,845 | £243,027 | £0 | £0 | £8,060 | £788,082 | 45% | £1,751,293 |
| Co-op Bowland Drive, Emerson Valley | £0 | £106,460 | £103,384 | £248,027 | £59,905 | £0 | £5,373 | £523,149 | 35% | £1,494,712 |
| Co-op High St Winslow | £190,159 | £0 | £0 | £0 | £0 | £0 | £8,060 | £198,219 | 90% | £220,244 |
| Budgens Winslow | £190,159 | £0 | £0 | £0 | £0 | £0 | £8,060 | £198,219 | 90% | £220,244 |
| Other stores | £133,816 | £0 | £0 | £0 | £0 | £0 | £10,747 | £144,563 | 90% | £160,625 |
| **Outside Assessment Area** | | | | | | | | | | |
| Sainsbury's Bletchley | £986,010 | £2,691,919 | £2,628,908 | £4,402,472 | £276,485 | £538,463 | £537,349 | £12,061,607 | 45% | £26,803,571 |
| Tesco Extra, Bletchley | £676,121 | £5,490,299 | £5,346,432 | £8,966,162 | £1,815,587 | £3,535,905 | £806,023 | £26,636,528 | 41% | £64,967,141 |
| Asda Wal-Mart, Bletchley | £619,778 | £1,399,190 | £1,373,531 | £2,294,246 | £884,753 | £1,723,080 | £322,409 | £8,616,987 | 17% | £50,688,159 |
| Lidl, Princess Way, Bletchley | £70,429 | £0 | £0 | £0 | £0 | £0 | £5,373 | £75,803 | 20% | £379,014 |
| Iceland Bletchley | £70,429 | £152,086 | £147,691 | £248,027 | £92,162 | £179,488 | £26,867 | £916,750 | 20% | £4,583,750 |
| Aldi Bletchley | £70,429 | £152,086 | £147,691 | £248,027 | £92,162 | £179,488 | £26,867 | £916,750 | 20% | £4,583,750 |
| Tesco Extra, Kingston | £140,859 | £304,172 | £295,383 | £496,053 | £617,484 | £1,202,567 | £75,229 | £3,131,746 | 3% | £104,391,522 |
| Sainsbury's, Milton Keynes Central | £239,460 | £532,300 | £516,920 | £868,093 | £783,375 | £1,525,644 | £107,470 | £4,573,262 | 8% | £57,165,778 |
| Waitrose Milton Keynes Central | £281,717 | £395,423 | £383,998 | £644,869 | £46,081 | £89,744 | £107,470 | £1,949,302 | 7% | £27,847,169 |
| Marks and Spencer Milton Keynes Central | £281,717 | £0 | £0 | £0 | £129,026 | £251,283 | £26,867 | £688,894 | 11% | £6,262,670 |
| Tesco Express, Oldbrook Boulevard | £0 | £0 | £0 | £0 | £18,432 | £35,898 | £0 | £54,330 | 1% | £5,432,986 |
| Tesco, McConnell Drive, Wolverton | £0 | £304,172 | £295,383 | £496,053 | £184,324 | £358,975 | £53,735 | £1,692,641 | 1% | £169,264,133 |
| Netto, Glyn Sq Wolverton | £0 | £0 | £0 | £0 | £101,378 | £197,436 | £0 | £298,814 | 7% | £4,268,775 |
| Tesco Buckingham | £6,197,780 | £0 | £0 | £0 | £0 | £0 | £134,337 | £6,332,117 | 54% | £11,726,142 |
| Tesco Express Buckingham | £281,717 | £0 | £0 | £0 | £0 | £0 | £0 | £281,717 | 10% | £2,817,173 |
| Waitrose Buckingham | £366,232 | £0 | £0 | £0 | £0 | £0 | £0 | £366,232 | 11% | £3,329,386 |
| Other Locations | £1,007,139 | £631,156 | £620,304 | £1,041,712 | £663,565 | £1,346,157 | £268,674 | £5,578,707 | | £5,578,707 |
| **Totals** | **£14,085,863** | **£15,208,584** | **£14,769,148** | **£24,802,661** | **£9,216,176** | **£17,948,754** | **£5,373,485** | **£101,404,672** | | |

**Notes / Sources**

1.Inflow/outflow from MK Study and adjusted to allow for store openings.

2 Inflow by comparing total store turnover by turnover within catchment area.

**Impact on Stores 2021 with SWMK development**

**Table 11** **Impact on Turnover Levels in 2021**

| | Turnover 2014 | Turnover without SWMK 2021 | Turnover with SWMK 2021 | 2021 Trade gain or loss + or - | Impact at 2021 + or - | 2014-2021 trade gain or loss + or - | Change 2014-2021 + or - |
|---|---|---|---|---|---|---|---|
| Morrisons Westcroft | £73,588,600 | £84,898,530 | £87,569,106 | £2,670,577 | 3.05% | £13,980,507 | 15.97% |
| Tesco Express Bletchley Buckingham Road | £4,093,147 | £4,734,578 | £4,759,018 | £24,440 | 0.51% | £665,871 | 13.99% |
| Tesco Express Bletchley Melrose Avenue | £4,789,181 | £5,547,352 | £5,530,922 | -£16,430 | -0.30% | £741,742 | 13.41% |
| Co-op Newton Road, Bletchley | £1,510,304 | £1,750,280 | £1,751,293 | £1,013 | 0.06% | £240,989 | 13.76% |
| Co-op Bowland Drive, Emerson Valley | £1,287,728 | £1,492,526 | £1,494,712 | £2,187 | 0.15% | £206,984 | 13.85% |
| Co-op High St Winslow | £193,148 | £219,113 | £220,244 | £1,130 | 0.51% | £27,096 | 12.30% |
| Budgens Winslow | £193,148 | £219,113 | £220,244 | £1,130 | 0.51% | £27,096 | 12.30% |
| Other stores | £137,963 | £156,510 | £160,625 | £4,116 | 2.56% | £22,663 | 14.11% |
| **Outside Assessment Area** | | | | | | | |
| Sainsbury's Bletchley | £22,199,025 | £25,670,818 | £26,803,571 | £1,132,752 | 4.23% | £4,604,546 | 17.18% |
| Tesco Extra, Bletchley | £54,495,526 | £63,068,573 | £64,967,141 | £1,898,568 | 2.92% | £10,471,615 | 16.12% |
| Asda Wal-Mart, Bletchley | £42,359,035 | £48,954,046 | £50,688,159 | £1,734,113 | 3.42% | £8,329,124 | 16.43% |
| Lidl, Princess Way, Bletchley | £310,416 | £352,147 | £379,014 | £26,867 | 7.09% | £68,598 | 18.10% |
| Iceland Bletchley | £3,850,272 | £4,449,413 | £4,583,750 | £134,337 | 2.93% | £733,477 | 16.00% |
| Aldi Bletchley | £3,850,272 | £4,449,413 | £4,583,750 | £134,337 | 2.93% | £733,477 | 16.00% |
| Tesco Extra, Kingston | £88,190,606 | £101,883,895 | £104,391,522 | £2,507,626 | 2.40% | £16,200,915 | 15.52% |
| Sainsbury's, Milton Keynes Central | £48,314,530 | £55,822,407 | £57,165,778 | £1,343,371 | 2.35% | £8,851,248 | 15.48% |
| Waitrose Milton Keynes Central | £22,786,608 | £26,311,888 | £27,847,169 | £1,535,281 | 5.51% | £5,060,561 | 18.17% |
| Marks and Spencer Milton Keynes Central | £5,251,483 | £6,018,421 | £6,262,670 | £244,249 | 3.90% | £1,011,187 | 16.15% |
| Tesco Express, Oldbrook Boulevard | £4,704,720 | £5,432,986 | £5,432,986 | £0 | 0.00% | £728,266 | 13.40% |
| Tesco, McConnell Drive, Wolverton | £141,594,260 | £163,890,647 | £169,264,133 | £5,373,485 | 3.17% | £27,669,872 | 16.35% |
| Netto, Glyn Sq Wolverton | £3,696,566 | £4,268,775 | £4,268,775 | £0 | 0.00% | £572,209 | 13.40% |
| Tesco Buckingham | £10,117,261 | £11,477,370 | £11,726,142 | £248,772 | 2.12% | £1,608,882 | 13.72% |
| Tesco Express Buckingham | £2,483,328 | £2,817,173 | £2,817,173 | £0 | 0.00% | £333,845 | 11.85% |
| Waitrose Buckingham | £2,934,842 | £3,329,386 | £3,329,386 | £0 | 0.00% | £394,544 | 11.85% |
| Other Locations | £4,619,946 | £5,324,680 | £5,578,707 | £254,027 | 4.55% | £958,761 | 17.19% |

**Notes/Sources:**

1. Tables 6 and 8
2. Assumes convenience store is open but its turnover is diminshed because the population still growing and other shops and services are not yet open

**Expenditure Distribution / Market Share by Zone 2024 - without SWMK development**

**Table 12**

| | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 | SWMK | Total Trade from Catchment | % of turnover from Assessment area | Total T/O |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total Expenditure** | **£14,926,809** | **£16,185,435** | **£15,727,667** | **£26,247,774** | **£9,900,482** | **£19,424,616** | **£0** | | | |
| SWMK Neighbourhood Centre | | | | | | | | | | |
| Morrisons Westcroft | £2,313,655 | £1,893,696 | £1,840,137 | £3,070,990 | £3,366,164 | £6,604,369 | £0 | £19,089,011 | 21% | £90,900,053 |
| Tesco Express Bletchley Buckingham Rd | £74,634 | £420,821 | £408,919 | £839,929 | £237,612 | £543,889 | £0 | £2,525,804 | 50% | £5,051,609 |
| Tesco Express Bletchley Melrose Avenue | £0 | £582,676 | £566,196 | £918,672 | £99,005 | £194,246 | £0 | £2,360,795 | 40% | £5,901,987 |
| Co-op Newton Road, Bletchley | £0 | £291,338 | £283,098 | £262,478 | £0 | £0 | £0 | £836,914 | 45% | £1,859,808 |
| Co-op Bowland Drive, Emerson Valley | £0 | £113,298 | £110,094 | £262,478 | £69,303 | £0 | £0 | £555,173 | 35% | £1,586,208 |
| Co-op High St Winslow | £208,975 | £0 | £0 | £0 | £0 | £0 | £0 | £208,975 | 90% | £232,195 |
| Budgens Winslow | £208,975 | £0 | £0 | £0 | £0 | £0 | £0 | £208,975 | 90% | £232,195 |
| Other stores | £149,268 | £0 | £0 | £0 | £0 | £0 | £0 | £149,268 | 90% | £165,853 |
| **Outside Assessment Area** | | | | | | | | | | |
| Sainsbury's Bletchley | £1,044,877 | £2,881,007 | £2,799,525 | £4,672,104 | £297,014 | £582,738 | £0 | £12,277,265 | 45% | £27,282,812 |
| Tesco Extra, Bletchley | £716,487 | £5,859,127 | £5,693,415 | £9,501,694 | £1,950,395 | £3,826,649 | £0 | £27,547,768 | 41% | £67,189,678 |
| Asda Wal-Mart, Bletchley | £656,780 | £1,505,245 | £1,462,673 | £2,441,043 | £950,446 | £1,864,763 | £0 | £8,880,950 | 17% | £52,240,885 |
| Lidl, Princess Way, Bletchley | £74,634 | £0 | £0 | £0 | £0 | £0 | £0 | £74,634 | 20% | £373,170 |
| Iceland Bletchley | £74,634 | £161,854 | £157,277 | £262,478 | £99,005 | £194,246 | £0 | £949,494 | 20% | £4,747,469 |
| Aldi Bletchley | £74,634 | £161,854 | £157,277 | £262,478 | £99,005 | £194,246 | £0 | £949,494 | 20% | £4,747,469 |
| Tesco Extra, Kingston | £149,268 | £323,709 | £314,553 | £524,955 | £663,332 | £1,301,449 | £0 | £3,277,267 | 3% | £109,242,239 |
| Sainsbury's, Milton Keynes Central | £253,756 | £566,490 | £550,468 | £918,672 | £841,541 | £1,651,092 | £0 | £4,782,020 | 8% | £59,775,247 |
| Waitrose Milton Keynes Central | £298,536 | £420,821 | £408,919 | £682,442 | £49,502 | £97,123 | £0 | £1,957,344 | 7% | £27,962,063 |
| Marks and Spencer Milton Keynes Central | £298,536 | £0 | £0 | £0 | £138,607 | £271,945 | £0 | £709,088 | 11% | £6,446,250 |
| Tesco Express, Oldbrook Boulevard | £0 | £0 | £0 | £0 | £19,801 | £38,849 | £0 | £58,650 | 1% | £5,865,020 |
| Tesco, McConnell Drive, Wolverton | £0 | £323,709 | £314,553 | £524,955 | £198,010 | £388,492 | £0 | £1,749,719 | 1% | £174,971,947 |
| Netto, Glyn Sq Wolverton | £0 | £0 | £0 | £0 | £108,905 | £213,671 | £0 | £322,576 | 7% | £4,608,230 |
| Tesco Buckingham | £6,567,796 | £0 | £0 | £0 | £0 | £0 | £0 | £6,567,796 | 54% | £12,162,585 |
| Tesco Express Buckingham | £298,536 | £0 | £0 | £0 | £0 | £0 | £0 | £298,536 | 10% | £2,985,362 |
| Waitrose Buckingham | £388,097 | £0 | £0 | £0 | £0 | £0 | £0 | £388,097 | 11% | £3,528,155 |
| Other Locations | £1,074,730 | £679,788 | £660,562 | £1,102,406 | £712,835 | £1,456,846 | £0 | £5,687,168 | | £5,687,168 |
| **Totals** | **£14,926,809** | **£16,185,435** | **£15,727,667** | **£26,247,774** | **£9,900,482** | **£19,424,616** | **£0** | **£102,412,782** | | |

**Notes / Sources**

1. Inflow/outflow from MK Study and AVDC study and adjusted to allow for store openings.
2. Inflow by comparing total store turnover by turnover within catchment area.

**Expenditure Distribution / Market Share by Zone 2024 - with SWMK development**

**Table 13**

| | MK17 0 | MK3 5 | MK3 6 | MK3 7 | MK4 3 | MK4 4 | SWMK | Total Trade from Assesment Area | % of turnover from Assessment Area | Total T/O |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total Expenditure** | **£14,926,809** | **£16,185,435** | **£15,727,667** | **£26,247,774** | **£9,900,482** | **£19,424,616** | **£10,158,171** | | | |
| SWMK Neighbourhood Centre | £74,634 | £80,927 | £0 | £65,619 | £24,751 | £19,425 | £4,063,268 | £4,328,625 | 98% | £4,416,964 |
| Morrisons Westcroft | £2,276,338 | £1,893,696 | £1,840,137 | £3,057,866 | £3,346,363 | £6,584,945 | £1,218,980 | £20,218,325 | 21% | £96,277,739 |
| Tesco Express Bletchley Buckingham Rd | £67,171 | £412,729 | £408,919 | £839,929 | £237,612 | £543,889 | £50,791 | £2,561,039 | 50% | £5,122,078 |
| Tesco Express Bletchley Melrose Avenue | £0 | £574,583 | £566,196 | £905,548 | £99,005 | £194,246 | £25,395 | £2,364,974 | 40% | £5,912,434 |
| Co-op Newton Road, Bletchley | £0 | £283,245 | £283,098 | £262,478 | £0 | £0 | £15,237 | £844,058 | 45% | £1,875,685 |
| Co-op Bowland Drive, Emerson Valley | £0 | £113,298 | £110,094 | £262,478 | £64,353 | £0 | £10,158 | £560,381 | 35% | £1,601,088 |
| Co-op High St Winslow | £201,512 | £0 | £0 | £0 | £0 | £0 | £15,237 | £216,749 | 90% | £240,832 |
| Budgens Winslow | £201,512 | £0 | £0 | £0 | £0 | £0 | £15,237 | £216,749 | 90% | £240,832 |
| Other stores | £141,805 | £0 | £0 | £0 | £0 | £0 | £20,316 | £162,121 | 90% | £180,134 |
| **Outside Assessment Area** | | | | | | | | | | |
| Sainsbury's Bletchley | £1,044,877 | £2,864,822 | £2,799,525 | £4,658,980 | £297,014 | £582,738 | £1,015,817 | £13,263,773 | 45% | £29,475,051 |
| Tesco Extra, Bletchley | £716,487 | £5,842,942 | £5,693,415 | £9,488,570 | £1,950,395 | £3,826,649 | £1,523,726 | £29,042,184 | 41% | £70,834,596 |
| Asda Wal-Mart, Bletchley | £656,780 | £1,489,060 | £1,462,673 | £2,427,919 | £950,446 | £1,864,763 | £609,490 | £9,461,131 | 17% | £55,653,714 |
| Lidl, Princess Way, Bletchley | £74,634 | £0 | £0 | £0 | £0 | £0 | £10,158 | £84,792 | 20% | £423,961 |
| Iceland Bletchley | £74,634 | £161,854 | £157,277 | £262,478 | £99,005 | £194,246 | £50,791 | £1,000,285 | 20% | £5,001,423 |
| Aldi Bletchley | £74,634 | £161,854 | £157,277 | £262,478 | £99,005 | £194,246 | £50,791 | £1,000,285 | 20% | £5,001,423 |
| Tesco Extra, Kingston | £149,268 | £323,709 | £314,553 | £524,955 | £663,332 | £1,301,449 | £142,214 | £3,419,482 | 3% | £113,982,719 |
| Sainsbury's, Milton Keynes Central | £253,756 | £566,490 | £550,468 | £918,672 | £841,541 | £1,651,092 | £203,163 | £4,985,183 | 8% | £62,314,789 |
| Waitrose Milton Keynes Central | £298,536 | £420,821 | £408,919 | £682,442 | £49,502 | £97,123 | £203,163 | £2,160,508 | 7% | £30,864,398 |
| Marks and Spencer Milton Keynes Central | £298,536 | £0 | £0 | £0 | £138,607 | £271,945 | £50,791 | £759,878 | 11% | £6,907,985 |
| Tesco Express, Oldbrook Boulevard | £0 | £0 | £0 | £0 | £19,801 | £38,849 | £0 | £58,650 | 1% | £5,865,020 |
| Tesco, McConnell Drive, Wolverton | £0 | £323,709 | £314,553 | £524,955 | £198,010 | £388,492 | £101,582 | £1,851,301 | 1% | £185,130,118 |
| Netto, Glyn Sq Wolverton | £0 | £0 | £0 | £0 | £108,905 | £213,671 | £0 | £322,576 | 7% | £4,608,230 |
| Tesco Buckingham | £6,567,796 | £0 | £0 | £0 | £0 | £0 | £253,954 | £6,821,750 | 54% | £12,632,871 |
| Tesco Express Buckingham | £298,536 | £0 | £0 | £0 | £0 | £0 | £0 | £298,536 | 10% | £2,985,362 |
| Waitrose Buckingham | £388,097 | £0 | £0 | £0 | £0 | £0 | £0 | £388,097 | 11% | £3,528,155 |
| Other Locations | £1,067,267 | £671,696 | £660,562 | £1,102,406 | £712,835 | £1,456,846 | £507,909 | £6,179,520 | | £6,179,520 |
| **Totals** | **£14,926,809** | **£16,185,435** | **£15,727,667** | **£26,247,774** | **£9,900,482** | **£19,424,616** | **£10,158,171** | **£112,570,953** | | |

**Notes / Sources**

1.Inflow/outflow from MK Study and adjusted to allow for store openings.

2 Inflow by comparing total store turnover by turnover within catchment area.

## Impact on Stores 2021 with SWMK development

**Table 14** **Impact on Turnover Levels in 2024**

| | Turnover 2014 | Turnover without SWMK 2024 | Turnover with SWMK 2024 | 2024 Trade gain or loss + or - | Impact at 2024 + or - | 2014-2024 trade gain or loss + or - | Change 2014-2024 + or - |
|---|---|---|---|---|---|---|---|
| Morrisons Westcroft | £73,588,600 | £90,900,053 | £96,277,739 | £5,377,686 | 5.59% | £22,689,139 | 23.57% |
| Tesco Express Bletchley Buckingham Road | £4,093,147 | £5,051,609 | £5,122,078 | £70,469 | 1.38% | £1,028,931 | 20.09% |
| Tesco Express Bletchley Melrose Avenue | £4,789,181 | £5,901,987 | £5,912,434 | £10,447 | 0.18% | £1,123,253 | 19.00% |
| Co-op Newton Road, Bletchley | £1,510,304 | £1,859,808 | £1,875,685 | £15,877 | 0.85% | £365,381 | 19.48% |
| Co-op Bowland Drive, Emerson Valley | £1,287,728 | £1,586,208 | £1,601,088 | £14,880 | 0.93% | £313,360 | 19.57% |
| Co-op High St Winslow | £193,148 | £232,195 | £240,832 | £8,638 | 3.59% | £47,685 | 19.80% |
| Budgens Winslow | £193,148 | £232,195 | £240,832 | £8,638 | 3.59% | £47,685 | 19.80% |
| Other stores | £137,963 | £165,853 | £180,134 | £14,281 | 7.93% | £42,172 | 23.41% |
| **Outside Assessment Area** | | | | | | | |
| Sainsbury's Bletchley | £22,199,025 | £27,282,812 | £29,475,051 | £2,192,239 | 7.44% | £7,276,027 | 24.69% |
| Tesco Extra, Bletchley | £54,495,526 | £67,189,678 | £70,834,596 | £3,644,918 | 5.15% | £16,339,070 | 23.07% |
| Asda Wal-Mart, Bletchley | £42,359,035 | £52,240,885 | £55,653,714 | £3,412,829 | 6.13% | £13,294,679 | 23.89% |
| Lidl, Princess Way, Bletchley | £310,416 | £373,170 | £423,961 | £50,791 | 11.98% | £113,545 | 26.78% |
| Iceland Bletchley | £3,850,272 | £4,747,469 | £5,001,423 | £253,954 | 5.08% | £1,151,151 | 23.02% |
| Aldi Bletchley | £3,850,272 | £4,747,469 | £5,001,423 | £253,954 | 5.08% | £1,151,151 | 23.02% |
| Tesco Extra, Kingston | £88,190,606 | £109,242,239 | £113,982,719 | £4,740,480 | 4.16% | £25,792,113 | 22.63% |
| Sainsbury's, Milton Keynes Central | £48,314,530 | £59,775,247 | £62,314,789 | £2,539,543 | 4.08% | £14,000,259 | 22.47% |
| Waitrose Milton Keynes Central | £22,786,608 | £27,962,063 | £30,864,398 | £2,902,334 | 9.40% | £8,077,790 | 26.17% |
| Marks and Spencer Milton Keynes Central | £5,251,483 | £6,446,250 | £6,907,985 | £461,735 | 6.68% | £1,656,502 | 23.98% |
| Tesco Express, Oldbrook Boulevard | £4,704,720 | £5,865,020 | £5,865,020 | £0 | 0.00% | £1,160,300 | 19.78% |
| Tesco, McConnell Drive, Wolverton | £141,594,260 | £174,971,947 | £185,130,118 | £10,158,171 | 5.49% | £43,535,857 | 23.52% |
| Netto, Glyn Sq Wolverton | £3,696,566 | £4,608,230 | £4,608,230 | £0 | 0.00% | £911,664 | 19.78% |
| Tesco Buckingham | £10,117,261 | £12,162,585 | £12,632,871 | £470,286 | 3.72% | £2,515,610 | 19.91% |
| Tesco Express Buckingham | £2,483,328 | £2,985,362 | £2,985,362 | £0 | 0.00% | £502,034 | 16.82% |
| Waitrose Buckingham | £2,934,842 | £3,528,155 | £3,528,155 | £0 | 0.00% | £593,313 | 16.82% |
| Other Locations | £4,619,946 | £5,687,168 | £6,179,520 | £492,352 | 7.97% | £1,559,575 | 25.24% |

**Notes/Sources:**

1. Tables 6, 12 and 13.

JONES LANG LASALLE®

*Real value in a changing world*


James Owens

Director

30 Warwick Street

London

W1B 5NH

+44 (0)207 087 5480

james.owens@eu.jll.com