

RETAIL STATEMENT (APPENDIX 4) MILTON KEYNES EAST MARCH 2021



Milton Keynes East Retail and Town Centre Uses Statement

Hybrid Planning Application

St James Group Limited

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LICHFIELDS

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1.0 Introduction

- 1.1 This Retail and Town Centre Uses Statement has been prepared by Lichfields on behalf of St James Group Limited ('St James') in relation to the submission of a hybrid planning application for part of the Milton Keynes East ('MKE') strategic urban extension. The application site is located to the east of Milton Keynes to the east of the M1 and south-east of Newport Pagnell.
- 1.2 This statement is appended to the Planning Statement submitted as part of the application pack. The Planning Statement details the description of development as well as a full assessment of the scheme against relevant policy and guidance.

Purpose and structure

- 1.3 The Milton Keynes East development will include a diverse mix of associated uses, including retail, restaurants/food beverage, leisure/recreational space and community facilities. The objective is to create a community where people will choose to live and work and can enjoy community facilities at the heart of the new hub. This mix of uses provides key community infrastructure that serves day-to-day needs, which will reduce the need to travel elsewhere.
- 1.4 The proposed development will provide important shops, services and other facilities to help meet the needs of new residents, which will create sustainable shopping patterns. Milton Keynes East will include a Community Hub and a Local Parade, following the principles within the original Milton Keynes Masterplan. The proposed community hub will create focal points and a sense of 'place' for local residents. They will create a distinctive character for the new development which will foster community spirit and encourage social interaction.
- 1.5 These elements of the scheme are expected to provide the following main town centre uses (retail, service and commercial leisure uses) that will be assessed:
- up to 4,000 sq.m gross of shops, non-retail services, café/restaurants, pubs, takeaways) in the community hub;
 - up to 500 sq.m of shops, services, café/restaurants, takeaways in the local parade; and
 - and a 1,000 sq.m gross commercial gymnasium.

Assessment objectives

- 1.6 Retail, service and leisure uses are defined as main town centres uses within the revised National Planning Policy Framework (NPPF).
- 1.7 The assessment in this report includes three main elements of work, as follows:
- 1 an assessment of the quantitative and qualitative need for retail, service, commercial leisure and food/beverage uses at Milton Keynes East to meet the day to day needs of the new residents;
 - 2 identification of the scale and types of retail and service uses that should be provided to serve the proposed development; and
 - 3 building on the quantitative retail need assessment, an analysis of potential impact and implications for designated centres at Newport Pagnell and within Milton Keynes arising from the provision of a new retail / leisure development.
- 1.8 The report tests the appropriateness of the quantum and type of retail, leisure and service floorspace proposed, including the most likely mix of uses.
- 1.9 The statement is structured as follows:

- **Section 2.0** details relevant planning policy and guidance;
- **Section 3.0** describes the existing shopping hierarchy and provision;
- **Section 4.0** examines the need for the scale of retail and town centre uses proposed;
- **Section 5.0** assesses the potential impact this development will have on designated centres; and
- **Section 6.0** sets out the conclusions.

2.0 Planning Policy and Guidance

2.1 A full review of scheme against policy and guidance is included in the accompanying Planning Statement. The below sets out relevant policy and guidance associated with this Retail and Town Centre Uses Statement.

The Statutory Development Plan: Plan:MK (2019)

2.2 The statutory development plan principally comprises of the Plan:MK adopted in 2019.

Policy SD12 – Milton Keynes East strategic urban extension

2.3 Policy SD12 sets out that MKE will form a strategic urban extension to the city of Milton Keynes that will provide a comprehensive new residential and employment development that will contribute to meeting the long-term needs of the city. In respect of associated infrastructure, Policy SD12 requires future proposals to meet set criteria, including:

“Associated infrastructure including primary and secondary education, community facilities, health, retail and local services and a hotel. The development should comprise of a least one district centre and/or local centre(s), of scale commensurate to the needs of the new community and that would not adversely affect the viability and vitality of Newport Pagnell district centre, with a co-location of key facilities.” (C.3)

Other relevant policy

2.4 Other relevant retail and town centres policy in Plan:MK (2019) includes:

- **Policy ER9:** Character and Function of the Shopping Hierarchy;
- **Policy ER10:** Assessing Edge of Centre and Out of Centre Proposals; and
- **Policy ER14:** New Local Centres.

2.5 Part B of Policy ER9 indicates planning permission will be granted for retail and service uses to serve new areas of residential development. The scale of retail and service provision provided within new areas of residential development should cater for day to day shopping needs of the resident population and not draw trade from a wider area.

2.6 Policy ER10 sets out the retail impact and sequential tests, for retail and leisure development not on sites specifically allocated for such uses.

Other planning policy and guidance

National Planning Policy Framework (2019)

2.7 A revised National Planning Policy Framework was published in February 2019. In relation to retail and town centre uses, the revised NPPF does not change the overall aims of policy. At the heart of the NPPF is a presumption in favour of sustainable development (para. 11). For plan-making this means development plans should positively seek opportunities to meet the needs of their area and be sufficiently flexible to adapt to rapid change. Policies should set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for (para. 20) employment, retail, leisure, other commercial development and community facilities.

2.8 The NPPF (paragraph 92) identifies the need to plan positively for community facilities including local shops. In relation to large residential developments, paragraph 72 indicates that new homes can be provided within new settlements or significant extensions to existing villages,

provided they are well located and designed, and supported by the necessary infrastructure and facilities. This objective requires sufficient access to services and employment opportunities within the development itself. The benefits of providing an appropriate mix of uses within large scale development in terms of sustainable transport (minimising the number and length of journeys) is highlighted (paragraph 104).

- 2.9 In terms of retail uses, planning policies and decisions should support the role that centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should allocate a range of suitable sites to meet the scale and type of development likely to be needed. Meeting anticipated needs for retail, leisure, office and other main town centre uses should not be compromised by limited site availability. Where suitable and viable town centre and edge of centre sites are not available for main town centre uses, policies should explain how identified needs can be met in other accessible locations.
- 2.10 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.
- 2.11 The sequential approach test indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 86). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 87).
- 2.12 The Community Hub and Local Parade within the Milton Keynes East development are consistent with the SD12 allocation within an up-to-date development plan. In these circumstances it is not necessary to consider the sequential test. Furthermore, the National Planning Policy Guidance (NPPG) suggests certain main town centre uses have particular market and locational requirements, which mean they may only be accommodated in specific locations. Robust evidence is required to demonstrate a locational specific requirement when applying the sequential test.
- 2.13 A key consideration relating to a location specific requirement is whether the scale and type of development is commensurate with the proposed development i.e. will the development primarily serve local needs generated by the Milton Keynes East development or does it have a much wider catchment area.
- 2.14 The proposed Community Hub and Local Parade will have a relatively localised catchment areas, ultimately with most trade coming from the new residential development and the local surrounding area.
- 2.15 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold.
- 2.16 Where there is no locally set threshold, the default impact threshold is 2,500 sq. m (para. 89). An impact assessment should include:
- a 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

- b the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

2.17 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 90).

Other Guidance

2.18 The Council has adopted a number of Supplementary Planning Documents ('SPD') and guidance of which the most relevant is the MKE 'Development Framework' SPD (2020). This sets out key development principles for development at MKE and is a material consideration for this and future planning applications relating to the urban extension.

2.19 The Vision for Milton Keynes East indicates the new settlement should have "*a level of self-sufficiency similar to places like Woburn Sands and Stony Stratford*". The Vision statement also suggests "*the amounts and disposition of the retail offer and other community facilities should contribute to this single sense of place with a central pedestrian-priorities Community Hub offering a suitable scale and range of retail units, supplemented by smaller local centres that meet immediate day to day needs as appropriate throughout the residential areas.*"

2.20 Retail developments over 350 sq.m are required to be subject to a retail impact assessment. The scale and range of uses within the Community Hub is expected to be similar to Woburn Sands or Stony Stratford.

3.0 Existing shopping hierarchy and provision

Introduction

- 3.1 The proposed Community Hub within Milton Keynes East will be approximately 2.5km south east of Newport Pagnell town centre; 5 km east of Central Milton Keynes and about 4km north of Kingston District Centre. This section reviews the current network of centres, drawing on information from the Milton Keynes Retail Capacity and Leisure Study 2018 (MKRCLS).

The shopping hierarchy

- 3.2 Javelin's Venuescore ranks the UK's top 3,000 retail destinations including town centres and other shopping destinations. The results for Milton Keynes and the surrounding sub-region are shown in Table 3.1.

Table 3.1 Javelin's Venuescore UK shopping Index

Centre	UK Rank 2017	Venuescore 2017	Market position
Milton Keynes	34	294	Upper Middle
Northampton	63	217	Middle
Luton	90	191	Middle
Bedford	108	175	Middle
Banbury	121	171	Middle
Aylesbury	166	141	Middle
Dunstable	438	65	Lower Middle
Bicester	451	64	Middle
Kingston	482	61	Middle
Leighton Buzzard	592	51	Middle
Bletchley	633	48	n/a
Westcroft	1,187	27	n/a
Brackley	1,187	27	Middle
Flitwick	1,696	18	Middle
Towcester	1,775	17	Upper Middle
Wolverton	2,021	15	Lower Middle
Amphill	2,171	14	Middle
Buckingham	2,377	13	Upper Middle
Newport Pagnell	2,566	12	Middle
Olney	2,566	12	Upper Middle
Woburn Sands	2,815	11	Middle

Source: Javelin Group 2017

- 3.3 Each shopping destination is given a weighted score for multiple retailers present. The score attached to each retailer is weighted depending on their overall impact on shopping patterns. The Venuescore usually correlates to the actual market size of the shopping destination in terms of consumer expenditure. Javelin also assesses the market position of the larger town centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury (i.e. lower, middle to upscale).
- 3.4 The Javelin index ranks Milton Keynes and Northampton as the main centres at the top of the hierarchy, ranked 34th and 63rd respectively in the UK. Milton Keynes and Northampton's scores (over 200) reflect the higher number of national multiple retailers. These centres serve

wide sub-regional catchment areas. The lack of national multiple retailers in other centres in Milton Keynes Borough results in relatively low scores.

- 3.5 Most centres within the sub-region serve middle or lower middle markets, with Milton Keynes having the higher upper middle market position. Newport Pagnell is considered to be middle market by Javelin, whilst Wolverton is considered to be lower market, i.e. focusing on discount and value sector.
- 3.6 Local centres within the sub-region are not ranked by Javelin because they have a small number of multiple retailers, for example Stony Stratford. Woburn Sands has a Venuescore of 11. The MKE Development Framework SPD (2020) suggests the scale and range of uses within the proposed Community Hub is expected to be similar to Woburn Sands or Stony Stratford.
- 3.7 The MKRCLS 2018 includes a health check analysis of Woburn Sands and Stony Stratford and other centres in the Borough. A summary for the land use information for the main centres is shown in Table 3.2.

Table 3.2 Main town and district centres in Milton Keynes Borough

Centre	No. shop units	Convenience goods retail units/sq.m gross	Comparison goods retail units/floorspace sq.m gross	Food/ beverage units/ floorspace sq.m gross	Other non-retail service units/floorspace sq.m gross	Total floorspace sq.m gross
CMK	426	21 / 13,954	177 / 68,181	90 / 27,769	138 / 72,578	182,480
Bletchley	181	24 / 8,649	48 / 12,904	32 / 3,911	77 / 18,944	44,408
Kingston	41	3 / NA	13 / NA	8 / NA	17 / NA	NA
Newport Pagnell	130	12 / 1,589	35 / 4,171	27 / 3,289	56 / 5,620	14,669
Olney	92	10 / 1,923	42 / 3,976	16 / 2,388	24 / 2,499	10,786
Stony Stratford	142	13 / 2,276	45 / 6,094	27 / 4,877	57 / 7,554	20,801
Westcroft	25	3	8	6	8	NA
Woburn Sands	43	4 / NA	13 / NA	10 / NA	16 / NA	NA
Wolverton	76	10 / 9,968	16 / 2,471	20 / 2,564	30 / 3,187	18,190

Source: Milton Keynes Retail Capacity and Leisure Study 2018.

- 3.8 Consistent with this vision, the proposed community hub at Milton Keynes East will have a limited number of national multiples and will be lower tier shopping destinations. The new destination will become assimilated into the current network of shopping centres.

4.0 **The appropriate scale of town centre uses**

Introduction

- 4.1 This section assesses the quantitative scope for retail and food/beverage uses that could be provided to support the needs arising from the development. The capacity assessment is set out in more detail in the appendices to this report. This assessment draws on information from the Milton Keynes Retail Capacity and Leisure Study 2018 (MKRCLS).
- 4.2 This section sets out the methodology adopted and provides a quantitative capacity analysis in terms of levels of spending for convenience goods, comparison goods and food/beverage (eating and drinking away from the home).

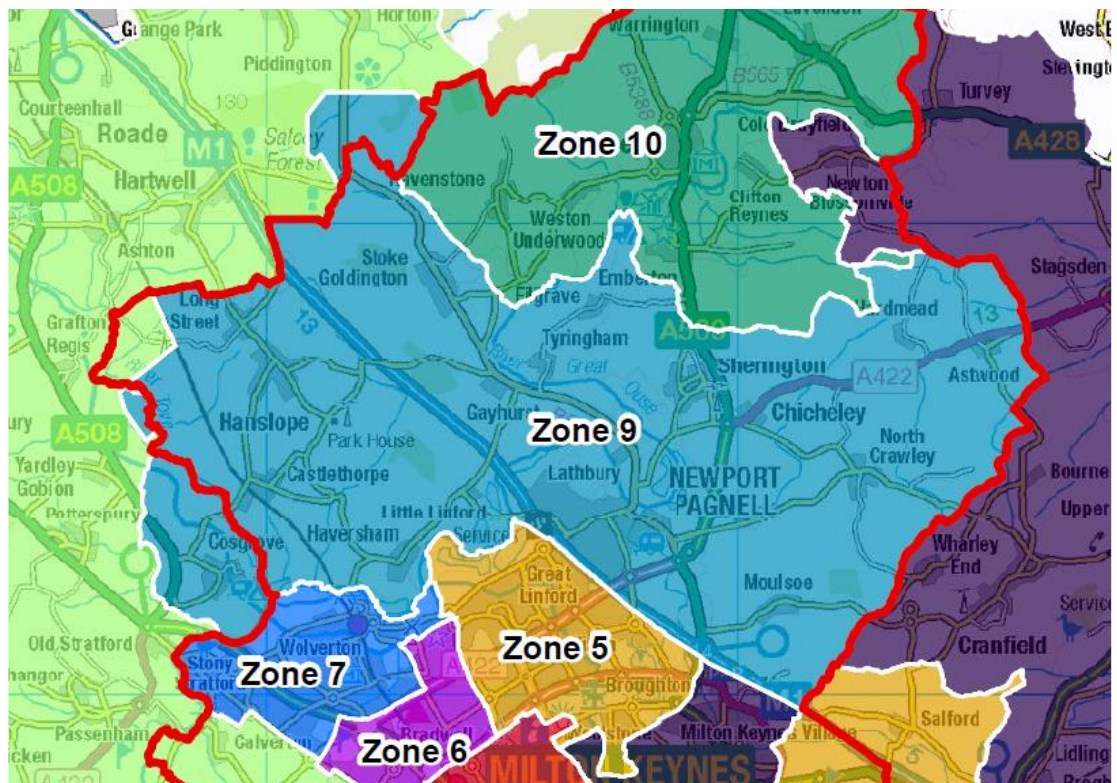
Methodology and base data

- 4.3 The quantitative assessment for the proposed new Community Hub and Local Parade includes the following:
- 1 identification of an appropriate catchment area for the proposed new development. Experian population and local expenditure projections have been obtained;
 - 2 estimations of the existing trade draw and trading performance of retail facilities within Milton Keynes Borough, drawing on household shopper survey information from the MKRCLS 2018; and
 - 3 an assessment of the future quantitative capacity for retail uses (comparison, convenience goods and food/beverage) generated by the 2,900 new dwellings with phased development assessed at 2032 (Phase 1 plus 2 years), 2037 (Phase 2) and 2048 (Phase 3), linked to the completion of new homes within the development.
- 4.4 The retail assessment assumes the community hub will be completed within Phase 1 (by 2030) and the local parade in the later phases. A design year of 2032 has been adopted to allow two years for the community hub to achieve full and settled trading levels.
- 4.5 All monetary values expressed in this report are at 2019 prices and therefore projections exclude inflation. The base year adopted for the impact assessment is also 2019, consistent with Experian's latest local expenditure figures.

Catchment area

- 4.6 The quantitative analysis is based on an identification of an appropriate catchment area for the proposed development. The MKRCLS 2018 adopted a study area broken down into 14 zones, as shown in Appendix 1 to this report. Milton Keynes East falls within Zone 9, as shown in Figure 4.1 overleaf.
- 4.7 The primary catchment of the proposed Community Hub will include the Milton Keynes East development area and the rest of Zone 9, recognising shopping catchment areas overlap and there will be crossflows of expenditure.

Figure 4.1 Milton Keynes Retail Capacity Assessment - Newport Pagnell Local Zone 9



Population and expenditure

4.8 Milton Keynes East population for the period 2030 to 2048 is set out in Table 4.1. The development proposals indicate 2,900 dwellings will be provided by 2048. The phasing of development suggests around 600 dwellings will be completed in Phase 1 by 2030. Table 4.1 sets out expected population growth, based on the expected phasing of development. An average of 2.4 people per dwelling has been assumed for the new dwellings.

Table 4.1 Expected dwelling delivery at Milton Keynes East

	2019	2030 end Phase 1	2032 Phase 1 + 2 years	2037 end Phase 2	2048 end Phase 3
MK East dwelling delivery	0	600	800	1,100	2,900
New population	0	1,440	1,920	2,640	6,690

4.9 Population projections in the MKRCLS 2018 study area zones are shown in Table 1 in Appendix 2. The study area population is projected to increase from 692,000 in 2019 to 773,790 by 2032, then increasing to 788,484 by 2037 and 823,693 by 2048.

4.10 Assessing future expenditure levels within this report needs to consider economic prospects, particularly in the short and medium term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the development period. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be considered and a balanced approach taken.

- 4.11 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future.
- 4.12 For convenience goods, Experian's forecasts anticipate limited growth future. For comparison goods, higher levels of growth are expected in the future (2.9% per annum from 2028), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 4.13 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. This assessment makes an allowance for future growth in e-tailing based on Experian projections. This home/e-tailing expenditure will not generate demand for traditional floorspace and has therefore been subtracted from the need and impact analysis, consistent with standard practice.
- 4.14 Given the likelihood that multi-channel shopping will continue to grow at a faster pace than total retail expenditure, the assessment has adopted relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.
- 4.15 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within Milton Keynes East and the MKRCLS 2018 study area zones. Forecasts for comparison goods and food/beverage are shown in Table 2 in Appendix 3 and Appendix 4 respectively.
- 4.16 Residents within the Milton Keynes East are expected to generate £14.49 million of new expenditure by 2032 (two years after the completion of Phase 1) that would not otherwise be available, broken down as follows:
- convenience goods expenditure = £4.14 million;
 - comparison goods expenditure = £7.66 million; and
 - Food/beverage expenditure = £2.69 million.
- 4.17 Based on the population projections outlined above and growth in per capita spending, convenience goods spending within Milton Keynes East is forecast to increase from £14.49 million in 2032 to £21.56 million in 2037, increasing to £68.08 million by 2048.
- 4.18 Convenience goods spending is forecast to increase from £4.14 million in 2032 to £5.70 million in 2037 and then £15.10 million in 2048. Convenience goods expenditure in the rest of Zone 9 is forecast to increase from £57.81 million in 2019 to £66.07 million in 2032; £68.85 million in 2037 and £71.80 million in 2048. Total expenditure growth in Zone 9 including Milton Keynes East from 2019 to 2048 is £29.09 million.
- 4.19 Comparison goods spending is forecast to increase from £7.66 million in 2032 to £11.99 million in 2037 and then £41.71 million in 2048. Comparison goods expenditure in the rest of Zone 9 is forecast to increase from £90.99 million in 2019 to £124.54 million in 2032; £147.40 million in 2037 and £202.12 million in 2048. Total expenditure growth in Zone 9 including Milton Keynes East from 2019 to 2048 is £152.84 million.
- 4.20 Food and beverage spending is forecast to increase from £2.69 million in 2032 to £3.87 million in 2037 and then £11.27 million in 2048. Food and beverage expenditure in the rest of Zone 9 is forecast to increase from £30.80 million in 2019 to £40.16 million in 2032; £43.69 million in

2037 and £50.10 million in 2048. Total expenditure growth in Zone 9 including Milton Keynes East from 2019 to 2048 is £30.57 million.

4.21 These figures relate to real growth and exclude inflation.

Existing spending patterns

Convenience goods retail (food and grocery)

4.22 The results of the household shopper survey and the MKRCLS 2018 have been used to estimate existing convenience goods shopping patterns.

4.23 The MKRCLS 2018 indicated that most (over 70%) of the convenience goods expenditure generated by residents in Zone 9 leaks to large food stores outside of this zone i.e. Wolverton (18.7%); Kingston District Centre (14.4%), Bletchley (8.9%) and CMK (7.3%). Newport Pagnell's market share in Zone 9 was only 8.4%. Expenditure leakage to facilities outside the Borough was 8.8%.

Comparison goods shopping

4.24 The MKRCLS 2018 indicated that comparison goods (predominantly durable goods) expenditure generated by residents in Zone 9 was primarily attracted to CMK (62.2%), out of centre retail destinations in Milton Keynes (14.8) and Kingston District Centre (6%). Newport Pagnell's market share in Zone 9 was only 5.3%. Expenditure leakage to facilities outside the Borough was 4.4%.

Food and beverage

4.25 Based on the MKRCLS household survey results Newport Pagnell retains 23.3% of food/beverage expenditure within Zone 9. Expenditure leakage is primarily attracted to CMK (22.4%), Kingston District Centre (13.7%) and Stony Stratford (5.7%). Expenditure leakage to facilities outside the Borough was 29.2%.

Future spending patterns

4.26 As indicated above, population and expenditure within the development and the local catchment area (Zone 9) are projected to grow significantly. Shops and services within this area currently retain a relatively low proportion of retail and food/beverage expenditure. As a minimum, Milton Keynes East should meet the day to day needs of residents within the development in order to minimise the need to travel for items and service purchased on a regular basis.

4.27 The development of the Community Hub provides an opportunity to increase expenditure retention within the local catchment area by improving the range and choice of facilities available. Future floorspace capacity has been assessed based on expected expenditure retention from both new Milton Keynes East residents and the clawback of some expenditure leakage from the rest of Zone 9.

4.28 Realistic expected expenditure retention rates/market shares are shown in Table 4.2, based on Lichfields' experience of similar new settlements and household survey results from the MKRCLS 2018.

Table 4.2 Retention rates (% market share and % inflow trade draw)

	Milton Keynes East	Rest of Zone 9	Inflow
Convenience Goods	60%	15%	10%
Comparison Goods	25%	2%	10%
Food / beverage	50%	10%	10%
Gymnasium/fitness club	60%	15%	10%

- 4.29 The expected retention of comparison goods expenditure within Milton Keynes East is much lower than for convenience goods shopping and food/beverage trips, because residents will generally travel further and shop around for comparison goods i.e. they will travel into CMK or further afield to visit larger shopping destinations. The provision of additional shopping facilities within Milton Keynes East will assist in increasing expenditure retention in the local catchment area (Zone 9).
- 4.30 These market shares are considered viable in terms of the scope to provide new facilities, the likely scale of a new retail facilities and the amount of expenditure leakage from the local catchment area.

Capacity for convenience goods floorspace

- 4.31 Adopting these market shares, the future retention of convenience goods expenditure is shown in Table 5, Appendix 2. Based on the provision of 2,900 dwellings, future levels of available convenience goods expenditure in 2032, 2037 and 2048 are provided in Table 4B in Appendix 2. This demonstrates total available convenience goods expenditure of £13.77 million at 2032, rising to £15.28 million at 2037 (1,100 homes) and up to £22.03 million at 2048 (2,900 homes).
- 4.32 Based on the expenditure retention rates in Table 4.2, expenditure projections have then been converted into floorspace estimates in Table 5 in Appendix 2. Expenditure is converted into floorspace estimates using an assumed average sales density figure of £11,000 per sq. m at 2019, which provides a viable and realistic turnover for a main supermarket operator and supporting small convenience goods shops (source: Global Data's food operator company average turnover estimates). The projected floorspace requirements are summarised in Table 4.3.

Table 4.3 Convenience floorspace capacity projections (sq. m gross)

	Phase 1	Phase 2	Phase 3
New retail floorspace	1,789	1,984	2,861

Source: Table 5, Appendix 2.

Capacity for comparison goods floorspace

- 4.33 As for the convenience goods retail capacity, the assumed retention rates have been used to determine the future levels of available comparison goods expenditure in Table 4B in Appendix 3. This analysis demonstrates available comparison expenditure of £4.90 million at 2032, rising to £6.61 million by 2037 and up to £16.08 million at 2048.
- 4.34 The available expenditure projections are converted into floorspace estimates in Table 5, Appendix 3. Expenditure is converted into floorspace estimates using an appropriate average sales density figure of £5,000 per sq. m at 2026, projected based on Experian's recommended turnover density growth rates. The projected floorspace requirements are summarised in Table 4.4.

Table 4.4 Comparison floorspace projections (sq. m gross)

	Phase 1	Phase 2	Phase 3
New retail floorspace	1,052	1,248	2,672

Source: Table 5, Appendix 3.

Capacity for food and beverage floorspace

4-35 The future levels of available food and beverage expenditure are shown at Table 4B in Appendix 4. This analysis suggests available expenditure of 5.96 million at 2032 rising to £7.01 million by 2037 (Phase 2) and up to £11.83 million at 2048.

4-36 Available food and beverage expenditure projections are converted into food and beverage floorspace projections at Table 5 in Appendix 4, adopting an average sales density of £5,000 per sq.m gross (source: company annual reports for selected food and beverage operators). The floorspace projections are summarised in Table 4.5.

Table 4.5 Food and beverage floorspace projections (sq. m gross)

	Phase 1	Phase 2	Phase 3
New F&B floorspace	1,192	1,401	2,366

Source: Table 5, Appendix 4.

Capacity for health fitness facilities

4-37 Sport England data for registered gymnasium facilities indicates that the South East Region average number of gymnasium fitness stations is 6.2 fitness stations per 1,000 population. Based on this national average, the Milton Keynes East population should be sufficient to support 43 fitness stations at 2043. Based on the retention rates in Table 4.2, the number of fitness stations that can be supported at Milton Keynes East is shown in Table 4.6. The projections are sufficient to support a health and fitness facility of up to 1,000 sq.m gross, including fitness station suite and rooms for fitness classes.

Table 4.6 Health and fitness station projections

	Phase 1	Phase 2	Phase 3
Milton Keynes East	7	10	26
Rest of Zone 9	26	27	29
Inflow	4	4	6
Total	37	41	61

Source: 5 stations per 1,000 people, population projections for MKE and Zone 9 and retention rates in Table 4.2.

Mix of uses

4-38 In addition to these retail and food/beverage uses, the Community Hub and Local Parade are likely to provide additional space for other non-retail service uses e.g. hairdressers, barbers, beauty salons, estate agents, solicitor/financial services etc. Lichfields would normally expect at least 20% extra floorspace to accommodate these non-retail service uses.

4.39 The floorspace projections at 2032 indicate that, as a minimum, the following floorspace could be provided within the Community Hub:

- Convenience goods retail = 1,789 sq.m gross
 - Comparison goods retail = 1,052 sq.m gross
 - Food/beverage outlets = 1,192 sq.m gross
 - Other non-retail services = 807 sq.m gross
- TOTAL: = 4,840 sq.m gross**

4.40 By 2037, these figures increase as follows:

- Convenience goods retail = 1,984 sq.m gross
 - Comparison goods retail = 1,248 sq.m gross
 - Food/beverage outlets = 1,401 sq.m gross
 - Other non-retail services = 927 sq.m gross
- TOTAL: = 5,560 sq.m gross**

4.41 As indicated in Section 1, up to 4,500 sq.m of shops, food/beverage and other non-retail services will be provided within the Community Hub and Local Parade. The proposed floorspace (4,500 sq.m gross) is consistent with the projections shown above. Based on the detailed capacity projections above, an indicative breakdown of the floorspace proposed is shown in Table 4.6.

Table 4.6 Indicative proposed retail and service floorspace breakdown (sq.m gross)

Location	Convenience retail	Comparison retail	Food/beverage	Other services	Total
Community hub	1,500	800	900	800	4,000
Local parade	200	100	100	100	500
Total	1,700	900	1,000	900	4,500

4.42 As indicated in Section 2, the scale and range of uses within the Community Hub is expected to be similar to Woburn Sands or Stony Stratford. Woburn Sands is the smaller of these two centres with 43 retail and service units. The Community Hub (up to 4,000 sq.m gross) is commensurate with the scale of Woburn Sands and much smaller than Stony Stratford. The Community Hub is expected to could include a food store of at least 1,500 sq. m gross floorspace suitable for both main/bulk food and top-up shopping.

4.43 The comparison goods shopping facilities are likely to include a pharmacist and other shops selling lower order comparison goods purchased on a day-to-day basis e.g. florist, hardware and household goods. The food/beverage outlets are likely to include a pub/restaurant (250 sq.m), smaller café/restaurants and takeaways.

4.44 The local parade is likely to include a small (200 sq. m gross) convenience store along with complementary uses up to 300 sq.m gross of other retail and non-retail services.

4.45 Overall, development of this scale would accommodate about 25 to 35 units. The Community Hub is likely to include 20 to 30 units, with about 5 units in the local parade.

5.0 Retail impact assessment

5.1 The level of trade diversion and impact caused by the development will depend on the scale of floorspace and the timing of development. Impact will be counter-balanced by the benefits of new expenditure generated by Milton Keynes East. In order to test the worst-case level of impact, the assessment assumes the maximum amount of floorspace will be developed within the Community Hub, which will be trading to its full potential by 2032 i.e. two years after the completion of Phase 1. The maximum floorspace parameters tested are as follows:

- convenience goods retail 1,800 sq.m gross;
- comparison goods retail 2,000 sq.m gross; and
- food/beverage outlets 1,000 sq.m gross.

5.2 The quantum of floorspace tested is 4,800 sq.m gross, compared with the indicative 4,000 sq.m gross proposed within the Community Hub. The impact assessment is robust and the levels of trade diversion and impact exceed level likely to be caused by the proposed development.

5.3 The expected maximum retail and food/beverage turnover of the development at 2032 is £26.79 million, broken down as follows:

- Convenience goods retail (1,800 sq.m gross) = £12.48 million
- Comparison goods retail (2,000 sq.m gross) = £9.31 million
- Food/beverage (1,000 sq.m gross) = £5.00 million

5.4 The distribution of trade diversion and impact described below is based on Lichfields' judgments, taking account the localised catchment area of the proposed development, the proximity of existing shopping destinations and the propensity of the proposed facilities to compete with these existing destinations. The general principle is that like competes with like and facilities within closest proximity to the proposed development will be the most affected.

Convenience goods retail impact

5.5 Turnover information for existing retail destinations (assuming no Milton Keynes East development) in 2017 has been derived from the market shares within the MKRCLS (2018), as shown in Table 6 of Appendix 2. The 2017 first base year turnover estimates are shown in Table 7 in Appendix 2. The combined total convenience goods turnover of existing retail facilities in Milton Keynes Borough is estimated to be £681.37 million in 2017.

Completions and commitments

5.6 The first base year turnover levels have been projected forward to 2019 based on constant market shares, as shown in Table 8 in Appendix 2. These projections exclude completions between 2017 and 2019. Table 9A in Appendix 2 sets out convenience goods retail completions and their expected turnover (£80.75 million) and Table 10A shows the expected distribution of trade drawn to these completions. Trading levels have been reassessed for 2019 taking account completions, as shown in Table 11 in Appendix 2. The combined total convenience goods turnover of existing retail facilities in Milton Keynes Borough is estimated to be £706.69 million in 2019. Table 11 represents the most recent pre-Covid 19 trading position for existing retail facilities within Milton Keynes Borough, which provides a helpful benchmark in assessing the implications of future trade diversion and impact.

5.7 The first design year turnover levels have been projected forward to 2026 based on constant market shares from 2019, as shown in Table 12 in Appendix 2. These 2026 projections exclude

commitments. The combined total convenience goods turnover of existing retail facilities in Milton Keynes Borough is projected to be £757.25 million in 2026, an increase of 7.2% from 2019 (up from £706.69 million).

5.8 Table 9B in Appendix 2 sets out convenience goods retail commitments and their expected turnover (£60.54 million) and Table 10B shows the expected distribution of trade drawn to these commitments. Trading levels have been reassessed for 2026 taking account commitments, as shown in Table 13 in Appendix 2.

5.9 The combined total convenience goods turnover of existing retail facilities in Milton Keynes Borough is expected to fall from £757.25 million to £721.17 million due to the completion of commitments, an average impact of -4.8% in 2026. This level of impact has previously been considered acceptable when commitments were granted planning permission. The residual turnover of existing facilities (£721.17 million) is 2% higher than base year turnover levels (£706.69 million). These figures indicate the impact of commitments will be offset by population/expenditure growth between 2019 and 2026. A summary of the impact of convenience goods commitments is shown in Table 18 in Appendix 2.

Milton Keynes East

5.10 The proposed Community Hub is expected to be completed in Phase 1 (by 2030). Allowing for two years post completion to achieve full and settled trading patterns, a second design year of 2032 has been adopted. The 2032 design year turnover levels, without Milton Keynes East, have been projected forward from 2026, as shown in Table 14 in Appendix 2. The combined total convenience goods turnover of existing and committed retail facilities in Milton Keynes Borough is estimated to be £813.27 million in 2032.

5.11 Table 9C in Appendix 2 sets out the convenience goods turnover (£12.48 million) of the Community Hub at Milton Keynes East based on food store with a maximum of 1,800 sq.m gross. Table 10C shows the expected distribution of trade draw to the development. Trading levels have been reassessed for 2032 taking account of the development, as shown in Table 15 in Appendix 2.

5.12 The combined total convenience goods turnover of existing/committed retail facilities in Milton Keynes Borough is expected to fall from £813.3 million to £806.15 million due to the Milton Keynes East development, an average impact of -0.9% in 2032. These figures indicate the convenience goods impact of Milton Keynes East will be offset by population/expenditure growth between 2026 and 2032. This residual turnover (£806.15 million) is 3% higher than projected trading levels in 2026 (£781.73 million in Table 13, Appendix 2). A summary of the impact of convenience goods development is shown in Table 19 in Appendix 2.

5.13 The implications of these trade diversion and impact estimates are assessed later in this section.

5.14 Horizon year convenience goods trading level at 2037 and 2048 are shown in Tables 16 and 17 in Appendix 2 and summarised in Table 20. The combined total convenience goods turnover of existing and committed retail facilities in Milton Keynes Borough is estimated to increase to £818.86 million in 2037 and £850.97 million in 2048, compared with £781.73 million in 2026.

Comparison goods retail impact

5.15 Turnover information for existing retail destinations (assuming no Milton Keynes East development) in 2019 has been derived from the market shares within the MKRCLS (2018), as shown in Table 6 of Appendix 3. The 2019 base year turnover estimates are shown in Table 7 in Appendix 2. The combined total comparison goods turnover of existing retail facilities in Milton Keynes Borough is estimated to be £1,554.98 million in 2019.

Commitments

- 5.16 The base year turnover levels have been projected forward to 2026 based on constant market shares as shown in Table 8 in Appendix 2. The combined total comparison goods turnover of existing retail facilities in Milton Keynes Borough is estimated to be £1,713.16 million in 2026. These 2026 projections exclude commitments.
- 5.17 Table 9A in Appendix 3 sets out comparison goods retail commitments and their expected turnover (£145.57 million) and Table 10A shows the expected distribution of trade drawn to these commitments. Trading levels have been reassessed for 2026 taking account commitments, as shown in Table 11 in Appendix 3. The combined total comparison goods turnover of existing retail facilities in Milton Keynes Borough is estimated to reduce from £1,713.16 million to £1,591.26 million in 2026, an average impact of -7.1% in 2026. This level of impact has previously been considered acceptable when commitments were granted planning permission.
- 5.18 The 2026 residual turnover of existing facilities (£1,591.26 million) is 2.3% higher than base year turnover levels (£1,554.98 million). These figures indicate the impact of commitments will be offset by population/expenditure growth between 2019 and 2026. A summary of the impact of comparison goods commitments is shown in Table 16 in Appendix 3.

Milton Keynes East

- 5.19 The 2032 design year turnover levels, without Milton Keynes East, have been projected forward from 2026, as shown in Table 12 in Appendix 3. The combined total comparison goods turnover of existing and committed retail facilities in Milton Keynes Borough is estimated to be £2096.36 million in 2032.
- 5.20 Table 9B in Appendix 3 sets out the comparison goods turnover (£9.31 million) of the Community Hub at Milton Keynes East based on a maximum of 2,000 sq.m gross. Table 10B shows the expected distribution of trade draw to the development. Trading levels have been reassessed for 2032 taking account of the development, as shown in Table 13 in Appendix 3.
- 5.21 The combined total comparison goods turnover of existing/committed retail facilities in Milton Keynes Borough is expected to decrease marginally from £2,096.36 million to £2,094.82 million due to the Milton Keynes East development, an average impact of less than -0.1% in 2032. These figures indicate comparison goods trade diversion to Milton Keynes East will be offset by spin-off trade generated by new residents within the development at 2032. A summary of the impact of comparison goods development is shown in Table 17 in Appendix 3.
- 5.22 The implications of these trade diversion and impact estimates are assessed later in this section.
- 5.23 Horizon year comparison goods trading level at 2037 and 2048 are shown in Tables 14 and 15 in Appendix 3 and summarised in Table 18. The combined total comparison goods turnover of existing and committed retail facilities in Milton Keynes Borough is estimated to increase to £2,424 million in 2037 and over £3,328 million in 2048, compared with £1,736 million in 2026.

Food/beverage impact

- 5.24 The market shares and turnover estimates for existing retail destinations (assuming no Milton Keynes East development) in 2019 has been derived from the household survey undertaken for the MKRCLS (2018), as shown in Tables 6 and 7 in Appendix 4. The combined total food/beverage turnover of existing facilities in Milton Keynes Borough is estimated to be £472.71 million in 2019 as shown in Table 7 in Appendix 4.

Commitments

- 5.25 The base year turnover levels have been projected forward to 2026 based on constant market shares as shown in Table 8 in Appendix 4. The combined total food/beverage turnover of existing facilities in Milton Keynes Borough is estimated to be £ 495.03 million in 2026. These 2026 projections exclude commitments.
- 5.26 Table 9A in Appendix 4 sets out food/beverage commitments and their expected turnover (£47 million) and Table 10A shows the expected distribution of trade drawn to these commitments. Trading levels have been reassessed for 2026 taking account commitments, as shown in Table 11 in Appendix 4. The combined total food/beverage turnover of existing facilities in Milton Keynes Borough is estimated to reduce from £495.03 million to £457.52 million in 2026, an average impact of -7.6% in 2026. The residual turnover of existing facilities (£457.52 million) is -3.2% lower than base year turnover levels (£472.71 million). A summary of the impact of food/beverage commitments is shown in Table 16 in Appendix 4.

Milton Keynes East

- 5.27 The 2032 design year turnover levels, without Milton Keynes East, have been projected forward from 2026, as shown in Table 12 in Appendix 4. The combined total food/beverage turnover of existing and committed facilities in Milton Keynes Borough is estimated to be £557.70 million in 2032.
- 5.28 Table 9B in Appendix 4 sets out the food/beverage turnover (£5 million) of the Community Hub at Milton Keynes East based on a maximum of 1,000 sq.m gross. Table 10B shows the expected distribution of trade draw to the development. Trading levels have been reassessed for 2032 taking account of the development, as shown in Table 13 in Appendix 4.
- 5.29 The combined total food/beverage turnover of existing/committed facilities in Milton Keynes Borough is expected to reduce marginally from £557.7 million to £556.2 million due to the Milton Keynes East development, an average impact of only -0.3% in 2032. These figures indicate nearly all of the food/beverage trade diversion to Milton Keynes East will be offset by spin-off trade generated by new residents within the development at 2032. A summary of the impact of food/beverage development is shown in Table 17 in Appendix 4.
- 5.30 The implications of these trade diversion and impact estimates are assessed later in this section.
- 5.31 Horizon year food/beverage trading level at 2037 and 2048 are shown in Tables 14 and 15 in Appendix 4 and summarised in Table 18. The combined total food/beverage turnover of existing and committed retail facilities in Milton Keynes Borough is estimated to increase to £590 million in 2037 and £675 million in 2048, compared with £504 million in 2026.

Implications for designated centres

- 5.32 The proposed Community Hub will divert trade from designated centres but the new residential development and Milton Keynes Eats will also generate additional expenditure to offset this trade diversion. The centres most likely to be affected will be Newport Pagnell Town Centre, Kingston District Centre and Olney Town Centre. The implications for the vitality and viability of these centres is outlined below.

Newport Pagnell Town Centre

- 5.33 The MKRCLS 2018 undertook a centre health check for Newport Pagnell. The centre is described as a traditional town centre with 130 shops units. Retail outlets represent less than 40% of occupied units in the centre. The MKRCLS identified a relatively low shop vacancy rate of 3.8% compared with the national average of 11.2%.

- 5.34 The centre's convenience goods offer includes two small Co-op stores on the High Street (463 sq.m net and 231 sq.m net respectively). These stores cater for basket and top-up food and grocery shopping trips rather than main/bulk food shopping trips. The Co-op stores are supported by a small selection of small convenience goods shops, including a newsagent, greengrocer, butcher, sandwich shop and sweet shop.
- 5.35 The MKRCLS indicates Newport Pagnell has a reasonable selection of comparison goods shops (35), mostly small independent specialists. The number of national multiples is limited but includes Boots and Superdrug. The evening economy is strong with 27 outlets (13 restaurant/cafés, 5 pubs/bars and 9 takeaways).
- 5.36 The analysis of base year spending patterns suggest the 2019 pre-Covid 2019 turnover of Newport Pagnell town centre was £29.33 million broken down as follows:
- Convenience goods £6.59 million;
 - Comparison goods £6.71 million;
 - Food/beverage £16.03 million.
- 5.37 Experian's expenditure projections assess the short to medium term recovery from the Covid-19 crisis. Experian's projections and population growth suggest the centre's combined turnover will recover from the Covid-19 crisis and increase from £29.33 million in 2019 to £31.89 million in 2026, a +8.7% increase. The impact of commitments will reduce the 2026 turnover to £30.49 million, which is still 4% higher than the 2019 base year turnover.
- 5.38 By 2032, the centre's turnover is projected to increase to £33.86 million, without the Milton Keynes East development. The net impact of the proposed Community Hub and new homes at Milton Keynes East will marginally reduce this 2032 turnover to £33.61 million, a very small negative impact of -0.7%. This reduction will be offset by less than one year's growth after 2032. The residual turnover (£33.61 million) and percentage impact are broken down as follows:
- Convenience goods £7.21 million (-1.6%);
 - Comparison goods £8.80 million (+0.7%);
 - Food/beverage £17.60 million (-1.1%).
- 5.39 The residual convenience goods turnover (£7.21 million) is still 9.4% higher than the 2019 base year turnover (£6.59 million). Cumulative trade diversion to commitments and Milton Keynes East will be offset by expenditure/population growth between 2019 to 2032. Most of the convenience goods trade diversion will come from the two Co-op stores, which will continue to trade viably, above 2019 levels.
- 5.40 The residual comparison goods turnover (£8.8 million) is 31% higher than the 2019 base year turnover (£6.71 million). Cumulative trade diversion to commitments and Milton Keynes East will be more than offset by expenditure/population growth between 2019 to 2032. Residual turnover growth will be available to support future investment within the town centre.
- 5.41 The residual food and beverage turnover (£17.6 million) is 9.8% higher than the 2019 base year turnover (£16.03 million). Cumulative trade diversion to commitments and Milton Keynes East will again be offset by expenditure/population growth between 2019 to 2032.
- 5.42 The assessment of trade diversion and impact suggests the maximum floorspace parameters will have a negligible impact on Newport Pagnell town centre and will not harm the centre's vitality or viability. In the longer term continued population and expenditure growth will increase Newport Pagnell's residual turnover from £33.61 million in 2032 to £36.94 million in 2037 and £46.25 million in 2048. Growth in population and expenditure indicate no significant harm to existing investment or potential future investment in the town centre.

Kingston District Centre

- 5.43 Kingston is a purpose built district centre anchored by a large Tesco Extra superstore. Other outlets include Boots, Wilko, Mamas & Papas, Nandos, Café Nero, McDonalds, Starbucks and Costa Coffee.
- 5.44 The analysis of base year spending patterns suggest the 2019 pre-Covid 2019 turnover of Kingston District Centre was £171.01 million broken down as follows:
- Convenience goods £75.11 million;
 - Comparison goods £69.10 million;
 - Food/beverage £26.80 million.
- 5.45 Experian's projections and population growth suggest the centre's combined turnover will increase from £171.01 million in 2019 to £184.27 million in 2026, a +7.8% increase. The impact of commitments will reduce the 2026 turnover to £178.55 million, which is still 4.4% higher than the 2019 base year turnover.
- 5.46 By 2032, the centre's turnover is projected to increase to £198.13 million, without the Milton Keynes East development. The impact of the proposed Community Hub and new homes at Milton Keynes East will reduce this 2032 turnover to £195.91 million, an impact of -1.1%. The residual turnover (£195.91 million) and percentage impact are broken down as follows:
- Convenience goods £79.50 million (-2.4%);
 - Comparison goods £87.60 million (+0.1%);
 - Food/beverage £28.81 million (-1.1%).
- 5.47 The residual convenience goods turnover (£79.5 million) is 5.8% higher than the 2019 base year turnover (£75.11 million). Cumulative trade diversion to commitments and Milton Keynes East will be offset by expenditure/population growth between 2019 to 2032. Nearly all the convenience goods trade diversion will come from the Tesco Extra superstore, which will continue to trade healthily.
- 5.48 The comparison goods turnover (£87.6 million) of the centre is 27% higher than the 2019 base year turnover (£69.1 million).
- 5.49 The residual food and beverage turnover (£28.81 million) is 7.5% higher than the 2019 base year turnover (£26.80 million). Cumulative trade diversion to commitments and Milton Keynes East will again be offset by expenditure/population growth between 2019 to 2032.
- 5.50 The assessment of trade diversion and impact suggests the maximum floorspace parameters will not have a significant adverse impact on Kingston District Centre's vitality or viability in 2032. In the longer term continued population and expenditure growth will increase Kingston's residual turnover from £195.91 million in 2032 to £212.83 million in 2037 and £259.01 million in 2048. Growth in population and expenditure indicate no significant harm to existing investment or potential future investment in the town centre.

Olney Town Centre

- 5.51 Olney is a small centre with 92 shop units. Its convenience offer includes a small Co-op supermarket (613 sq.m net) and a Tesco Express (206 sq.m net), catering for basket and top-up food and grocery shopping trips rather than main/bulk food shopping trips. Olney has a larger out-of-centre Sainsbury's store (893 sq.m net). The MKRCLS indicates Olney has a reasonable selection of comparison goods shops (42), mostly small independent specialists. The MKRCLS identified only one vacant shop unit in Olney.

- 5.52 The analysis of base year spending patterns suggest the 2019 pre-Covid 2019 turnover of Olney Town Centre was £28.08 million broken down as follows:
- Convenience goods £9.08 million;
 - Comparison goods £8.59 million;
 - Food/beverage £10.41 million.
- 5.53 Experian's projections and population growth suggest the centre's combined turnover will increase from £28.08 million in 2019 to £30.13 million in 2026, a +7.3% increase. The impact of commitments will reduce the 2026 turnover to £28.73 million, which is still 2.3% higher than the 2019 base year turnover.
- 5.54 By 2032, the centre's turnover is projected to increase to £32.16 million, without the Milton Keynes East development. The impact of the proposed Community Hub and new homes at Milton Keynes East will reduce this 2032 turnover to £31.83 million, an impact of -1%. The residual turnover (£31.83 million) and percentage impact are broken down as follows:
- Convenience goods £9.65 million (-1.4%);
 - Comparison goods £11.22 million (0%);
 - Food/beverage £10.96 million (-1.7%).
- 5.55 The residual convenience goods turnover (£9.65 million) is 6.2% higher than the 2019 base year turnover (£9.08 million). Cumulative trade diversion to commitments and Milton Keynes East will be offset by expenditure/population growth between 2019 to 2032. Most of the convenience goods trade diversion will come from the Co-op and Tesco Express stores, which will continue to trade viably.
- 5.56 The comparison goods turnover (£11.22 million) of the centre is over 30% higher than the 2019 base year turnover (£8.59 million).
- 5.57 The residual food and beverage turnover (£10.96 million) is 5.3% higher than the 2019 base year turnover (£10.41 million). Cumulative trade diversion to commitments and Milton Keynes East will again be offset by expenditure/population growth between 2019 to 2032.
- 5.58 The assessment of trade diversion and impact suggests the maximum floorspace parameters will not have a significant adverse impact on Olney Town Centre's vitality or viability in 2032. In the longer term continued population and expenditure growth will increase Olney's residual turnover from £31.83 million in 2032 to £34.34 million in 2037 and £41.28 million in 2048. Growth in population and expenditure indicate no significant harm to existing investment or potential future investment in the town centre.

Other centres

- 5.59 Trade diversion from other centres will be dispersed e.g. from Central Milton Keynes, Wolverton and Bletchley. In all cases trade diversion will be more than offset by expenditure growth between 2019 and 2032. No significant adverse impact is expected on any centre.
- 5.60 The convenience goods impact on other designated centres in Milton Keynes Borough at 2032 ranges from -0.1% to -2%. The highest impact is on Wolverton, with most of the trade diversion from the Tesco, Asda and Lidl store's, which will continue to trade viably. Impact on local centres is only -0.4%.
- 5.61 Comparison goods impact on other centres is broadly neutral, with additional expenditure from Milton Keynes East residents off-setting trade diversion.

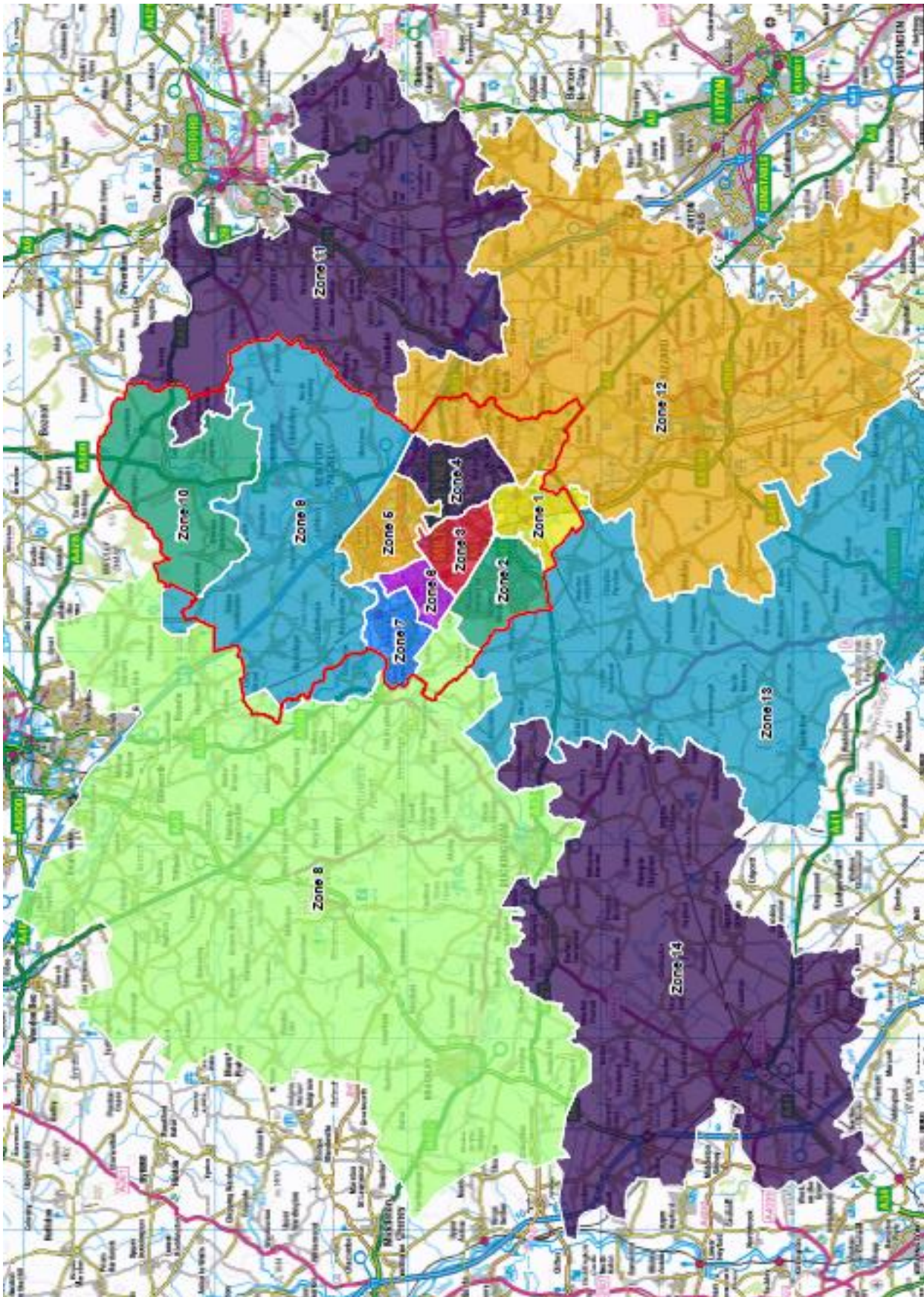
5.62 Food/beverage impact ranges from -0.1% to -0.5%. This trade diversion will be offset by expenditure growth between 2019 and 2032.

6.0 Conclusions

- 6.1 Milton Keynes East includes a diverse mix of uses providing key community infrastructure that serves most day-to-day needs, reducing the need to travel beyond the development. The proposed Community Hub and Local Parade will create focal points and a sense of 'place'. This report provides guidance on the potential quantum and type/mix of retail/services that should meet these objectives and be viable.
- 6.2 Subject to the careful phasing of the retail and service floorspace in the Community Hub and across the application site to align with the delivery of new homes, this Retail Impact Assessment demonstrates that there will be net positive expenditure impacts on nearby centres, helping to positively support the vitality and viability of those centres closest to MKE. With this appropriate phasing, there will be no adverse impacts arising from the proposed development.
- 6.3 The Plan:MK Local Plan clearly envisages that Milton Keynes East will be served by new designated centres. The provision of a Community Hub and Local Parade is consistent with adopted policy.
- 6.4 The floorspace capacity projections confirm there is scope for retail, food beverage and non-retail services floorspace of up to 5,560 sq.m gross by 2037, based on the projected level and timing of housing delivery. Ultimately, the Community Hub and Local Parade will predominantly serve new residents within Milton Keynes East when the population has built up. As a worst case the impact assessment adopts worst case (high) floorspace parameters and an early design year (2032).
- 6.5 An indicative breakdown of floorspace and the maximum parameters tested in this impact assessment for the Community Hub in Phase 1 (in brackets) are provided below.
- Convenience goods retail = 1,700 sq. m gross (1,800 sq.m gross)
 - Comparison goods retail = 900 sq.m gross (2,000 sq.m gross)
 - Food/beverage outlets = 1,000 sq.m gross (1,000 sq.m gross)
 - Other non-retail services = 900 sq.m gross (n/a)
 - Health and fitness centre (at least 60 fitness stations).
- 6.6 The impact assessment for convenience and comparison goods retail and food and beverage uses assesses a worst case scenario with 4,800 sq.m gross fully occupied within the Community Hub and trading to its full potential at 2032, when only 800 homes are expected to be delivered at that time. In reality the Community Hub will be smaller, around 4,000 sq.m gross and will not be fully occupied until more than 800 homes are completed, and therefore the net impact will be positive i.e. new expenditure from new homes exceeds trade diversion to the Community Hub.
- 6.7 Even based on the worst case scenario (4,800 sq.m gross with only 800 new homes) the retail impact assessment demonstrates the net effect of the Community Hub and new homes at Milton Keynes East will be a very small net trade diversion from some destinations. The centres most likely to be affected are Newport Pagnell, Kingston and Olney but the worst case levels of new trade diversion are negligible, at 2032 are still limited, and will be offset by less than one year's growth after 2032. In all cases the levels of cumulative trade diversion and proportional impact will be more than offset by population/expenditure growth between 2019 and 2032. No significant adverse impact is envisaged on these centres. Any further household growth that may come forward within the MKE allocation from the adjacent Bloor development in the period up to 2032, will reduce levels of impact.

- 6.8 The scale of retail/leisure uses proposed is not expected to have any adverse impact on any designated centres. Furthermore, significant residual expenditure growth between 2019 and 2037 will be available to assist further investment within designated centres in Milton Keynes Borough.
- 6.9 In order to ensure the net impact of the proposed Community Hub is positive for nearby centres, St James proposes a planning condition that will ensure not more than 3,000 sq.m gross of retail, service and food beverage floorspace will be occupied within the Community Hub until at least 800 new homes are completed at Milton Keynes East. Not more than 4,000 sq.m gross will be occupied within the MKE development until at least 1,100 new homes are completed.

Appendix 1 Study area



Appendix 2 Convenience assessment

Table 1: Study Area Population (with Milton Keynes East)

Zone	2017	2019	2026	2032	2037	2048
Milton Keynes East development	0	0	0	1,920	2,640	6,960
Zone 1 - Bletchley	30,903	31,621	33,805	35,564	35,829	36,723
Zone 2 - Milton Keynes West	53,666	55,085	59,482	63,056	63,527	65,112
Zone 3 - Milton Keynes Central	29,766	30,561	32,938	34,837	35,098	35,973
Zone 4 - Milton Keynes South East	39,473	40,927	42,864	43,445	43,769	44,861
Zone 5 - Milton Keynes North East	29,134	29,827	31,926	33,613	33,864	34,708
Zone 6 - Milton Keynes North West	22,200	22,763	24,355	25,589	25,780	26,423
Zone 7 - Stony Stratford/Wolverton	27,871	28,585	30,599	32,160	32,400	33,208
Zone 8 - Buckingham/Brackley/Towcester	83,744	84,927	88,631	91,657	94,103	99,177
Zone 9 - Newport Pagnell	24,511	24,707	27,380	28,407	29,552	30,704
Zone 10 - Olney	9,611	9,835	10,504	11,040	11,123	11,400
Zone 11 - Ampthill/Flitwick/Cranfield	59,450	60,763	65,027	68,569	69,893	72,789
Zone 12 - Leighton Buzzard	91,919	93,994	100,497	105,811	107,854	112,325
Zone 13 - Aylesbury	116,707	119,255	127,044	133,333	136,914	144,112
Zone 14 - Bicester	58,853	59,750	62,529	64,789	66,138	69,219
Total	677,808	692,598	737,581	773,790	788,484	823,693

*Sources:**Milton Keynes Retail Capacity and Leisure Study 2018 (population to 2031)**ONS 2018 based population projections 2031 to 2043 (extrapolated to 2048)**Milton Keynes East: 800 homes by 2032; 1,100 by 2037 and 2,900 by 2048 (2.4 people per home)*

Table 2A: Convenience goods expenditure £ per person (2019 prices)

Zone	2017 (inc. SFT)	2017 (excl. SFT)	2019 (excl. SFT)	2026 (excl. SFT)	2032 (excl. SFT)	2037 (excl. SFT)	2048 (excl. SFT)
Milton Keynes East development	2,263	2,184	2,170	2,171	2,157	2,161	2,169
Zone 1 - Bletchley	2,114	2,040	2,027	2,028	2,015	2,019	2,026
Zone 2 - Milton Keynes West	2,104	2,030	2,017	2,018	2,006	2,009	2,016
Zone 3 - Milton Keynes Central	2,011	1,941	1,928	1,929	1,917	1,920	1,927
Zone 4 - Milton Keynes South East	2,187	2,110	2,097	2,098	2,085	2,088	2,096
Zone 5 - Milton Keynes North East	2,224	2,146	2,133	2,134	2,120	2,124	2,131
Zone 6 - Milton Keynes North West	2,177	2,101	2,087	2,088	2,075	2,079	2,086
Zone 7 - Stony Stratford/Wolverton	2,112	2,038	2,025	2,026	2,013	2,017	2,024
Zone 8 - Buckingham/Brackley/Towcester	2,377	2,294	2,279	2,280	2,266	2,270	2,278
Zone 9 - Newport Pagnell	2,440	2,355	2,340	2,341	2,326	2,330	2,338
Zone 10 - Olney	2,482	2,395	2,380	2,381	2,366	2,370	2,379
Zone 11 - Ampthill/Flitwick/Cranfield	2,445	2,359	2,344	2,346	2,331	2,335	2,343
Zone 12 - Leighton Buzzard	2,436	2,351	2,336	2,337	2,322	2,326	2,335
Zone 13 - Aylesbury	2,309	2,228	2,214	2,215	2,201	2,205	2,213
Zone 14 - Bicester	2,362	2,279	2,265	2,266	2,251	2,255	2,264

Table 2B: Local catchment comparison goods expenditure £ per person (2019 prices)

Zone	2019 (excl. SFT)	2026 (excl. SFT)	2032 (excl. SFT)	2037 (excl. SFT)	2048 (excl. SFT)
Milton Keynes East development	2,170	2,171	2,157	2,161	2,169
Zone 9 - Newport Pagnell	2,340	2,341	2,326	2,330	2,338

Sources:

Milton Keynes Retail Capacity and Leisure Study 2018 (2017 base year expenditure adjusted to 2019 prices)
Experian expenditure and SFT projections - Retail Planner Briefing Note 18 - October 2020

Table 3A: Total Convenience goods expenditure (£m)

Zone	2017	2019	2026	2032	2037	2043
Milton Keynes East development	0.00	0.00	0.00	4.14	5.70	15.10
Zone 1 - Bletchley	63.04	64.10	68.56	71.66	72.33	74.40
Zone 2 - Milton Keynes West	108.96	111.13	120.06	126.46	127.63	131.30
Zone 3 - Milton Keynes Central	57.76	58.93	63.55	66.78	67.40	69.33
Zone 4 - Milton Keynes South East	83.31	85.83	89.93	90.57	91.40	94.03
Zone 5 - Milton Keynes North East	62.53	63.61	68.12	71.26	71.91	73.98
Zone 6 - Milton Keynes North West	46.64	47.52	50.86	53.10	53.59	55.13
Zone 7 - Stony Stratford/Wolverton	56.80	57.89	62.00	64.74	65.34	67.22
Zone 8 - Buckingham/Brackley/Towcester	192.09	193.57	202.11	207.67	213.59	225.94
Zone 9 - Newport Pagnell	57.71	57.81	64.09	66.07	68.85	71.80
Zone 10 - Olney	23.02	23.41	25.01	26.12	26.36	27.12
Zone 11 - Ampthill/Flitwick/Cranfield	140.27	142.46	152.53	159.80	163.18	170.57
Zone 12 - Leighton Buzzard	216.08	219.55	234.86	245.69	250.88	262.24
Zone 13 - Aylesbury	260.04	264.03	281.42	293.46	301.87	318.91
Zone 14 - Bicester	134.15	135.32	141.69	145.87	149.17	156.69
Total	1,502.40	1,525.14	1,624.77	1,693.39	1,729.21	1,813.75

Source: Tables 1 and 2

Table 3B: Local catchment convenience goods expenditure (£m)

Zone	2019	2026	2032	2037	2048
Milton Keynes East development	0.00	0.00	4.14	5.70	15.10
Zone 9 - Newport Pagnell	57.81	64.09	66.07	68.85	71.80
Total	57.81	64.09	70.21	74.56	86.90

Source: Tables 1B and 2B

Table 4A: Lichfields' estimated retained convenience goods expenditure (% of total)

Zone	MKE	Zone 9	Inflow
Milton Keynes East development	60%	15%	10%

Table 4B: Retained convenience goods expenditure (£M)

By year	MKE	Zone 9	Inflow	Total
2026	0.00	9.61	1.07	10.68
2032	2.48	9.91	1.38	13.77
2037	3.42	10.33	1.53	15.28
2048	9.06	10.77	2.20	22.03

Source: Table 3A and 4A

Table 5: Convenience goods floorspace capacity (sq.m)

By year	Retained expenditure £M	Turnover density new floorspace £ per sq.m net	Sales floorspace capacity sq.m net	Gross (1) floorspace sq.m
2026	10.68	11,000	971	1,387
2032	13.77	11,000	1,252	1,789
2037	15.28	11,000	1,389	1,984
2048	22.03	11,000	2,003	2,861

Sources:

Table 4B

Milton Keynes Retail Capacity and Leisure Study 2018

(1) Net to gross ratio - 70%

Table 6: Base year 2017 convenience goods market shares (%)

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Designated Centres															
Central Milton Keynes	10.0%	3.2%	8.6%	19.5%	5.4%	14.8%	21.1%	13.3%	1.6%	7.3%	10.9%	0.6%	1.9%	0.4%	0.0%
Kingston DC	20.0%	0.8%	0.8%	11.2%	35.6%	12.8%	3.5%	0.5%	0.1%	14.4%	8.9%	5.5%	6.6%	0.3%	0.0%
Westcroft DC	0.0%	8.8%	36.8%	5.4%	2.1%	1.7%	2.6%	4.3%	0.0%	1.5%	0.0%	0.5%	0.6%	3.1%	1.0%
Bletchley DC	0.0%	28.6%	3.2%	5.3%	5.3%	0.6%	1.4%	0.8%	0.0%	0.2%	0.0%	0.0%	0.6%	1.4%	0.0%
Wolverton DC	15.0%	0.0%	0.4%	0.5%	2.4%	2.9%	18.3%	47.0%	3.4%	18.7%	0.7%	0.0%	0.0%	0.1%	0.0%
Newport Pagnell TC	15.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.2%	0.5%	0.0%	8.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Olney TC	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	41.8%	0.0%	0.0%	0.0%	0.0%
Stony Stratford TC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Woburn Sands TC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	5.6%	0.0%	0.0%
Local centres	5.0%	2.9%	25.3%	24.5%	15.6%	33.8%	37.0%	8.4%	1.1%	18.7%	9.8%	4.9%	0.4%	0.9%	1.3%
Out of centre															
Asda, Bletchley	10.0%	18.3%	10.3%	13.6%	5.9%	12.7%	4.9%	6.2%	1.8%	8.5%	0.0%	1.2%	1.4%	1.6%	0.0%
Costco, Kingston	1.0%	0.0%	0.2%	0.4%	0.9%	2.2%	0.0%	0.0%	0.1%	0.6%	1.1%	2.1%	1.5%	0.4%	0.2%
M&S, Bletchley	0.0%	0.7%	2.1%	1.0%	0.5%	0.6%	1.9%	1.2%	0.0%	0.3%	0.1%	0.4%	0.6%	0.3%	0.0%
Tesco Extra, Bletchley	1.0%	27.6%	6.7%	2.6%	2.4%	2.5%	2.0%	0.0%	0.6%	1.7%	0.3%	0.6%	2.4%	0.8%	0.0%
Waitrose, Oakgrove	10.0%	1.3%	3.7%	8.9%	20.1%	8.1%	5.0%	4.6%	1.0%	8.5%	3.7%	0.9%	2.1%	1.4%	0.0%
Other out of centre	3.0%	7.0%	1.3%	7.0%	1.8%	3.2%	1.0%	4.8%	0.1%	1.7%	3.3%	1.2%	1.5%	1.6%	0.0%
MK Total	95.0%	99.2%	99.5%	100.0%	97.9%	99.1%	99.1%	98.6%	10.3%	91.2%	80.6%	18.5%	25.4%	12.3%	2.5%
Other outside MK	5.0%	0.8%	0.5%	0.0%	2.1%	0.9%	0.9%	1.4%	89.7%	8.8%	19.4%	81.5%	74.6%	87.7%	97.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Milton Keynes Retail Capacity and Leisure Study 2018 (Table 1, Appendix 15) - 2017 base year market shares excluding SFT.

Table 7: First base year convenience goods turnover at 2017 (£M)

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2017	0.00	63.04	108.96	57.76	83.31	62.53	46.64	56.80	192.09	57.71	23.02	140.27	216.08	260.04	134.15	1502.40
Designated Centres																
Central Milton Keynes	0.00	2.00	9.36	11.26	4.48	9.27	9.84	7.55	3.08	4.20	2.51	0.90	4.20	1.08	0.00	69.71
Kingston DC	0.00	0.52	0.89	6.46	29.69	8.00	1.65	0.29	0.21	8.34	2.05	7.68	14.23	0.81	0.00	80.81
Westcroft DC	0.00	5.54	40.11	3.14	1.72	1.08	1.22	2.46	0.00	0.84	0.00	0.75	1.40	8.13	1.40	67.79
Bletchley DC	0.00	18.03	3.45	3.08	4.39	0.38	0.66	0.47	0.00	0.13	0.00	0.00	1.40	3.52	0.00	35.51
Wolverton DC	0.00	0.00	0.45	0.30	1.98	1.84	8.52	26.68	6.57	10.79	0.15	0.00	0.00	0.27	0.00	57.55
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	1.84	0.09	0.29	0.00	4.85	0.00	0.00	0.00	0.00	0.00	7.07
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	9.62	0.00	0.00	0.00	0.00	10.03
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.86	0.41	0.39	0.00	0.00	0.00	0.00	0.00	4.66
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	12.13	0.00	0.00	12.74
Local centres	0.00	1.80	27.52	14.16	13.00	21.14	17.27	4.80	2.05	10.79	2.25	6.92	0.93	2.44	1.68	126.76
Out of centre																
Asda, Bletchley	0.00	11.53	11.25	7.88	4.91	7.93	2.31	3.51	3.49	4.91	0.00	1.66	3.03	4.06	0.00	66.47
Costco, Kingston	0.00	0.00	0.22	0.24	0.77	1.40	0.00	0.00	0.21	0.32	0.25	3.01	3.27	1.08	0.28	11.05
M&S, Bletchley	0.00	0.45	2.34	0.59	0.43	0.38	0.89	0.70	0.00	0.19	0.03	0.60	1.40	0.81	0.00	8.82
Tesco Extra, Bletchley	0.00	17.39	7.35	1.48	1.98	1.59	0.94	0.00	1.23	0.97	0.08	0.90	5.13	2.17	0.00	41.21
Waitrose, Oakgrover	0.00	0.84	4.01	5.15	16.78	5.08	2.35	2.63	1.85	4.91	0.86	1.20	4.43	3.52	0.00	53.63
Other out of centre	0.00	4.44	1.45	4.03	1.46	2.03	0.47	2.75	0.21	0.97	0.76	1.66	3.27	4.06	0.00	27.55
MK Total	0.00	62.53	108.40	57.76	81.58	61.95	46.21	55.98	19.72	52.61	18.56	25.89	54.84	31.96	3.36	681.37
Other outside MK	0.00	0.52	0.56	0.00	1.72	0.57	0.42	0.82	172.37	5.11	4.46	114.38	161.24	228.08	130.78	821.03
TOTAL	0.00	63.04	108.96	57.76	83.31	62.53	46.64	56.80	192.09	57.71	23.02	140.27	216.08	260.04	134.15	1502.40

Source: Table 3A and 6.

Table 8: Second base year 2019 convenience goods turnovers (£M) - no completions since 2017

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2019	0.00	64.10	111.13	58.93	85.83	63.61	47.52	57.89	193.57	57.81	23.41	142.46	219.55	264.03	135.32	1525.14
Designated Centres																
Central Milton Keynes	0.00	2.03	9.55	11.48	4.61	9.43	10.02	7.69	3.11	4.21	2.55	0.92	4.27	1.10	0.00	70.96
Kingston DC	0.00	0.52	0.91	6.59	30.59	8.14	1.68	0.30	0.21	8.35	2.09	7.80	14.46	0.83	0.00	82.45
Westcroft DC	0.00	5.63	40.91	3.20	1.77	1.10	1.25	2.50	0.00	0.84	0.00	0.76	1.42	8.25	1.41	69.05
Bletchley DC	0.00	18.33	3.52	3.14	4.52	0.39	0.67	0.48	0.00	0.13	0.00	0.00	1.42	3.58	0.00	36.18
Wolverton DC	0.00	0.00	0.45	0.30	2.04	1.87	8.68	27.19	6.62	10.81	0.15	0.00	0.00	0.28	0.00	58.40
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	1.87	0.10	0.30	0.00	4.85	0.00	0.00	0.00	0.00	0.00	7.12
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	9.78	0.00	0.00	0.00	0.00	10.20
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.93	0.41	0.39	0.00	0.00	0.00	0.00	0.00	4.74
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.61	12.33	0.00	0.00	12.94
Local centres	0.00	1.83	28.07	14.45	13.39	21.50	17.60	4.89	2.07	10.81	2.29	7.03	0.95	2.48	1.70	129.04
Out of centre																
Asda, Bletchley	0.00	11.72	11.48	8.04	5.05	8.07	2.35	3.58	3.52	4.92	0.00	1.68	3.08	4.13	0.00	67.62
Costco, Kingston	0.00	0.00	0.23	0.24	0.80	1.42	0.00	0.00	0.21	0.32	0.26	3.06	3.32	1.10	0.28	11.23
M&S, Bletchley	0.00	0.46	2.39	0.60	0.44	0.39	0.91	0.72	0.00	0.19	0.03	0.61	1.42	0.83	0.00	8.99
Tesco Extra, Bletchley	0.00	17.68	7.50	1.51	2.04	1.61	0.96	0.00	1.24	0.97	0.08	0.92	5.22	2.20	0.00	41.92
Waitrose, Oakgrover	0.00	0.85	4.09	5.26	17.29	5.17	2.40	2.68	1.86	4.92	0.88	1.22	4.50	3.58	0.00	54.70
Other out of centre	0.00	4.52	1.48	4.11	1.51	2.07	0.48	2.80	0.21	0.97	0.77	1.68	3.32	4.13	0.00	28.04
MK Total	0.00	63.57	110.56	58.93	84.05	63.03	47.09	57.05	19.87	52.69	18.87	26.29	55.72	32.45	3.39	693.58
Other outside MK	0.00	0.52	0.57	0.00	1.77	0.58	0.43	0.83	173.69	5.11	4.53	116.17	163.83	231.58	131.93	831.57
TOTAL	0.00	64.10	111.13	58.93	85.83	63.61	47.52	57.89	193.57	57.81	23.41	142.46	219.55	264.03	135.32	1525.14

Source: Table 3A and 6.

Table 9A: Food store completions since 2017 - convenience goods turnover £M

	Floorspace net sales Sq.M	% convenience goods sales	Convenience goods sales floorspace sq.m net	Company turnover density £ per sq.m net	Expected turnover £M
Aldi, Watling Street	1,159	80%	927	11,195	10.38
Asda, Jersey Drive	627	90%	564	14,852	8.38
Budgens, Addington Ave.	288	95%	274	8,354	2.29
Budgens, Dalgin Place	288	95%	274	8,354	2.29
Budgens, Dodkin	90	95%	86	8,354	0.71
Budgens, Downs Barn	78	95%	74	8,354	0.62
Budgens, Tenterden Cres.	111	95%	105	8,354	0.88
Co-op, Bodmin Place, Newport Pagnell	211	95%	200	11,407	2.29
Co-op, Tattenhoe Lane	292	95%	277	11,407	3.16
Iceland, Stratford Road	906	95%	861	7,109	6.12
Lidl, Fen Street, Newport Pagnell	1,078	80%	862	11,439	9.86
Lidl, Stratford Road	1,629	80%	1,303	11,439	14.91
Morrison's Daily, Portway	171	95%	162	13,074	2.12
Sainsbury's Lavendon Rd, Olney	893	90%	804	12,297	9.88
Sainsbury's Locla, Brooklands	288	95%	274	12,297	3.36
Tesco Express, Gifford Park	253	95%	240	14,515	3.49
Total	8,362		7,288		80.75

Sources: ORC Storepoint food store database (quarter one 2021). GlobalData Sales densities 2020

Table 9B: Food store commitments - convenience goods turnover £M

	Floorspace net sales Sq.M	% convenience goods sales	Convenience goods sales floorspace sq.m net	Company turnover density £ per sq.m net	Expected turnover £M
Tattenhoe Park new local centre	701	95%	666	12,000	7.99
Western Expansion Area - anchor store	5,600	72%	4,000	12,000	48.00
Western Expansion Area - High Street	400	100%	400	7,000	2.80
Western Expansion Area - Local Centre	250	100%	250	7,000	1.75
Total	6,951		5,316		60.54

Sources: MKBC planning application records

Table 9C: Milton Keynes East - convenience goods turnover £M

	Floorspace net sales sq.m	% convenience goods sales	Convenience goods sales floorspace sq.m net	Company turnover density £ per sq.m net	Expected turnover £M
Community Hub food store	1,300	80%	1,040	12,000	12.48
Total	1,300		1,040	12,000	12.48

Notes - maximum floorspace parameter for new food store 1,800 sq.m gross (1,300 sq.m net).

Table 10A: Food store completions - convenience goods turnover trade draw at 2019

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	0%	10%	15%	8%	12%	9%	7%	8%	3%	8%	3%	4%	8%	4%	1%	100%
Turnover £M	0.00	8.07	12.11	6.46	9.69	7.27	5.65	6.46	2.42	6.46	2.42	3.23	6.46	3.23	0.81	80.75

Table 10B: Food store commitments - convenience goods turnover trade draw at 2026

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	0%	3%	20%	4%	1%	1%	10%	10%	40%	2%	1%	0%	0%	4%	4%	100%
Turnover £M	0.00	1.82	12.11	2.42	0.61	0.61	6.05	6.05	24.22	1.21	0.61	0.00	0.00	2.42	2.42	60.54

Source: Table 7A/7B and Lichfields' estimates based on existing shopping patterns

Table 10C: Milton Keynes East - convenience goods turnover trade draw at 2032

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	20%	0%	0%	0%	5%	5%	0%	0%	0%	60%	5%	5%	0%	0%	0%	100%
Turnover £M	2.50	0.00	0.00	0.00	0.62	0.62	0.00	0.00	0.00	7.49	0.62	0.62	0.00	0.00	0.00	12.48

Source: Lichfields' estimates based on existing shopping patterns

Table 11: Base year convenience goods turnovers 2019 (£M) - with completions since 2017

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2019	0.00	64.10	111.13	58.93	85.83	63.61	47.52	57.89	193.57	57.81	23.41	142.46	219.55	264.03	135.32	1525.14
Completions	0.00	8.07	12.11	6.46	9.69	7.27	5.65	6.46	2.42	6.46	2.42	3.23	6.46	3.23	0.81	80.75
Designated Centres																
Central Milton Keynes	0.00	1.84	8.47	10.28	4.13	8.27	8.58	6.84	3.05	3.71	2.26	0.89	4.10	1.08	0.00	63.52
Kingston DC	0.00	0.47	0.81	5.90	27.41	7.14	1.44	0.27	0.20	7.37	1.85	7.55	13.91	0.81	0.00	75.11
Westcroft DC	0.00	5.10	36.31	2.87	1.59	0.96	1.07	2.23	0.00	0.74	0.00	0.74	1.37	8.11	1.40	62.49
Bletchley DC	0.00	16.61	3.13	2.81	4.05	0.34	0.58	0.42	0.00	0.11	0.00	0.00	1.37	3.52	0.00	32.93
Wolverton DC	0.00	0.00	0.40	0.27	1.83	1.64	7.43	24.20	6.51	9.54	0.14	0.00	0.00	0.27	0.00	52.23
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	1.72	0.09	0.28	0.00	4.47	0.00	0.00	0.00	0.00	0.00	6.56
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	8.68	0.00	0.00	0.00	0.00	9.08
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.65	0.41	0.36	0.00	0.00	0.00	0.00	0.00	4.41
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	12.02	0.00	0.00	12.61
Local centres	0.00	1.78	27.01	13.94	12.92	20.62	16.76	4.71	2.06	10.39	2.21	6.96	0.94	2.46	1.69	124.44
Out of centre																
Asda, Bletchley	0.00	9.88	9.33	6.63	4.18	6.42	1.79	2.92	3.42	3.95	0.00	1.59	2.89	4.01	0.00	57.01
Costco, Kingston	0.00	0.00	0.21	0.22	0.74	1.30	0.00	0.00	0.20	0.30	0.24	2.99	3.23	1.09	0.28	10.82
M&S, Bletchley	0.00	0.43	2.21	0.56	0.41	0.36	0.82	0.66	0.00	0.18	0.02	0.60	1.39	0.82	0.00	8.46
Tesco Extra, Bletchley	0.00	14.90	6.09	1.25	1.69	1.28	0.73	0.00	1.21	0.78	0.06	0.87	4.88	2.14	0.00	35.88
Waitrose, Oakgrover	0.00	0.72	3.32	4.34	14.29	4.11	1.82	2.19	1.81	3.95	0.71	1.16	4.22	3.48	0.00	46.12
Other out of centre	0.00	3.81	1.20	3.39	1.25	1.64	0.36	2.29	0.20	0.78	0.63	1.59	3.11	4.01	0.00	24.26
MK Total	0.00	63.61	110.61	58.93	84.17	63.07	47.13	57.12	21.90	53.09	19.22	28.76	59.88	35.03	4.18	706.69
Other outside MK	0.00	0.49	0.53	0.00	1.65	0.53	0.39	0.77	171.67	4.71	4.19	113.70	159.67	229.01	131.15	818.46
TOTAL	0.00	64.10	111.13	58.93	85.83	63.61	47.52	57.89	193.57	57.81	23.41	142.46	219.55	264.03	135.32	1525.14

Source: Table 3A, 6 and 10A.

Table 12: Future convenience goods turnovers 2026 (£M) - without commitments

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2026	0.00	68.56	120.06	63.55	89.93	68.12	50.86	62.00	202.11	64.09	25.01	152.53	234.86	281.42	141.69	1624.77
Completions	0.00	8.64	13.09	6.97	10.15	7.78	6.05	6.92	2.53	7.16	2.59	3.46	6.91	3.44	0.85	86.53
Designated Centres																
Central Milton Keynes	0.00	1.97	9.15	11.09	4.33	8.86	9.19	7.33	3.19	4.12	2.42	0.95	4.39	1.15	0.00	68.12
Kingston DC	0.00	0.51	0.87	6.36	28.72	7.64	1.54	0.28	0.21	8.17	1.98	8.08	14.88	0.86	0.00	80.10
Westcroft DC	0.00	5.46	39.22	3.09	1.66	1.03	1.14	2.39	0.00	0.82	0.00	0.79	1.46	8.65	1.47	67.19
Bletchley DC	0.00	17.76	3.38	3.03	4.25	0.36	0.62	0.45	0.00	0.13	0.00	0.00	1.46	3.75	0.00	35.19
Wolverton DC	0.00	0.00	0.44	0.29	1.91	1.76	7.96	25.91	6.80	10.57	0.15	0.00	0.00	0.29	0.00	56.08
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	1.84	0.09	0.30	0.00	4.96	0.00	0.00	0.00	0.00	0.00	7.19
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.00	9.27	0.00	0.00	0.00	0.00	9.70
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.91	0.43	0.40	0.00	0.00	0.00	0.00	0.00	4.73
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	12.85	0.00	0.00	13.49
Local centres	0.00	1.90	29.19	15.03	13.54	22.08	17.94	5.04	2.15	11.51	2.36	7.45	1.00	2.62	1.77	133.59
Out of centre																
Asda, Bletchley	0.00	10.57	10.08	7.15	4.38	6.87	1.91	3.13	3.57	4.38	0.00	1.70	3.09	4.28	0.00	61.11
Costco, Kingston	0.00	0.00	0.23	0.24	0.78	1.40	0.00	0.00	0.21	0.33	0.25	3.20	3.46	1.16	0.29	11.56
M&S, Bletchley	0.00	0.46	2.38	0.61	0.43	0.38	0.88	0.71	0.00	0.20	0.03	0.64	1.48	0.87	0.00	9.07
Tesco Extra, Bletchley	0.00	15.94	6.58	1.34	1.77	1.37	0.78	0.00	1.26	0.87	0.07	0.93	5.23	2.28	0.00	38.42
Waitrose, Oakgrover	0.00	0.77	3.59	4.68	14.98	4.40	1.95	2.35	1.89	4.38	0.76	1.24	4.51	3.71	0.00	49.20
Other out of centre	0.00	4.07	1.30	3.66	1.31	1.76	0.39	2.45	0.21	0.87	0.67	1.70	3.33	4.28	0.00	25.98
MK Total	0.00	68.03	119.49	63.55	88.20	67.54	50.45	61.17	22.86	58.87	20.53	30.79	64.06	37.33	4.37	757.25
Other outside MK	0.00	0.53	0.57	0.00	1.73	0.57	0.42	0.83	179.25	5.22	4.48	121.73	170.80	244.08	137.31	867.52
TOTAL	0.00	68.56	120.06	63.55	89.93	68.12	50.86	62.00	202.11	64.09	25.01	152.53	234.86	281.42	141.69	1624.77

Source: Table 3A and 11.

Table 13: Future convenience goods turnovers 2026 (£M) - with commitments

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2026	0.00	68.56	120.06	63.55	89.93	68.12	50.86	62.00	202.11	64.09	25.01	152.53	234.86	281.42	141.69	1624.77
Commitments	0.00	1.82	12.11	2.42	0.61	0.61	6.05	6.05	24.22	1.21	0.61	0.00	0.00	2.42	2.42	60.54
Completions	0.00	8.46	11.69	6.70	10.09	7.71	5.17	6.24	2.11	7.02	2.52	3.46	6.91	3.40	0.82	82.31
Designated Centres																
Central Milton Keynes	0.00	1.93	8.18	10.67	4.30	8.77	7.86	6.62	2.65	4.03	2.35	0.95	4.39	1.14	0.00	63.84
Kingston DC	0.00	0.50	0.78	6.12	28.53	7.57	1.32	0.26	0.18	8.00	1.92	8.08	14.88	0.85	0.00	78.99
Westcroft DC	0.00	5.34	35.06	2.98	1.65	1.02	0.98	2.15	0.00	0.81	0.00	0.79	1.46	8.55	1.43	62.22
Bletchley DC	0.00	17.39	3.02	2.92	4.22	0.36	0.53	0.41	0.00	0.12	0.00	0.00	1.46	3.70	0.00	34.14
Wolverton DC	0.00	0.00	0.39	0.28	1.90	1.74	6.81	23.38	5.66	10.36	0.14	0.00	0.00	0.28	0.00	50.95
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	1.83	0.08	0.28	0.00	4.89	0.00	0.00	0.00	0.00	0.00	7.08
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35	0.00	9.03	0.00	0.00	0.00	0.00	9.38
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.65	0.38	0.39	0.00	0.00	0.00	0.00	0.00	4.42
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	12.85	0.00	0.00	13.49
Local centres	0.00	1.89	28.15	14.84	13.51	22.01	17.07	4.88	2.03	11.44	2.34	7.45	1.00	2.61	1.75	130.98
Out of centre																
Asda, Bletchley	0.00	10.20	8.29	6.71	4.33	6.76	1.45	2.62	2.58	4.24	0.00	1.70	3.09	4.19	0.00	56.16
Costco, Kingston	0.00	0.00	0.21	0.24	0.77	1.39	0.00	0.00	0.19	0.33	0.25	3.20	3.46	1.15	0.29	11.48
M&S, Bletchley	0.00	0.45	2.22	0.59	0.43	0.38	0.80	0.66	0.00	0.20	0.02	0.64	1.48	0.86	0.00	8.74
Tesco Extra, Bletchley	0.00	15.39	5.42	1.26	1.75	1.35	0.59	0.00	0.91	0.84	0.06	0.93	5.23	2.24	0.00	35.96
Waitrose, Oakgrover	0.00	0.74	2.95	4.39	14.82	4.33	1.48	1.96	1.36	4.24	0.73	1.24	4.51	3.63	0.00	46.38
Other out of centre	0.00	3.93	1.07	3.43	1.29	1.73	0.30	2.05	0.15	0.84	0.64	1.70	3.33	4.19	0.00	24.65
MK Total	0.00	68.04	119.53	63.55	88.21	67.55	50.49	61.22	42.78	58.94	20.61	30.79	64.06	39.23	6.72	781.71
Other outside MK	0.00	0.52	0.53	0.00	1.72	0.57	0.38	0.77	159.33	5.15	4.40	121.73	170.80	242.18	134.97	843.06
TOTAL	0.00	68.56	120.06	63.55	89.93	68.12	50.86	62.00	202.11	64.09	25.01	152.53	234.86	281.42	141.69	1624.77

Source: Table 3A, 10B and 12.

Table 14: Design year convenience goods turnovers 2032 (£M) - without Milton Keynes East

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2032	0.00	71.66	126.46	66.78	90.57	71.26	53.10	64.74	207.67	66.07	26.12	159.80	245.69	293.46	145.87	1689.24
Commitments	0.00	1.90	12.75	2.54	0.61	0.63	6.32	6.32	24.88	1.25	0.63	0.00	0.00	2.53	2.49	62.86
Completions	0.00	8.84	12.32	7.05	10.16	8.06	5.40	6.52	2.17	7.23	2.63	3.62	7.23	3.55	0.85	85.63
Designated Centres																
Central Milton Keynes	0.00	2.01	8.62	11.21	4.33	9.17	8.20	6.91	2.73	4.16	2.46	1.00	4.59	1.19	0.00	66.57
Kingston DC	0.00	0.52	0.82	6.43	28.74	7.92	1.37	0.27	0.18	8.25	2.01	8.47	15.57	0.89	0.00	81.43
Westcroft DC	0.00	5.58	36.92	3.13	1.67	1.07	1.02	2.25	0.00	0.83	0.00	0.83	1.53	8.91	1.47	65.21
Bletchley DC	0.00	18.18	3.18	3.07	4.25	0.38	0.55	0.43	0.00	0.13	0.00	0.00	1.53	3.86	0.00	35.55
Wolverton DC	0.00	0.00	0.41	0.30	1.92	1.82	7.10	24.42	5.82	10.68	0.15	0.00	0.00	0.30	0.00	52.91
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	1.91	0.09	0.29	0.00	5.04	0.00	0.00	0.00	0.00	0.00	7.33
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.00	9.43	0.00	0.00	0.00	0.00	9.79
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.81	0.39	0.40	0.00	0.00	0.00	0.00	0.00	4.61
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	13.45	0.00	0.00	14.12
Local centres	0.00	1.97	29.65	15.60	13.61	23.03	17.82	5.10	2.09	11.79	2.44	7.80	1.05	2.73	1.81	136.47
Out of centre																
Asda, Bletchley	0.00	10.67	8.73	7.05	4.36	7.07	1.52	2.74	2.65	4.37	0.00	1.79	3.23	4.37	0.00	58.53
Costco, Kingston	0.00	0.00	0.22	0.25	0.78	1.45	0.00	0.00	0.20	0.34	0.26	3.36	3.62	1.20	0.30	11.97
M&S, Bletchley	0.00	0.47	2.33	0.62	0.43	0.40	0.83	0.69	0.00	0.20	0.03	0.67	1.55	0.90	0.00	9.13
Tesco Extra, Bletchley	0.00	16.09	5.71	1.32	1.76	1.41	0.62	0.00	0.93	0.86	0.07	0.97	5.47	2.33	0.00	37.55
Waitrose, Oakgrover	0.00	0.77	3.11	4.61	14.92	4.53	1.55	2.05	1.40	4.37	0.76	1.30	4.72	3.79	0.00	47.88
Other out of centre	0.00	4.11	1.12	3.60	1.30	1.81	0.31	2.14	0.16	0.86	0.67	1.79	3.48	4.37	0.00	25.72
MK Total	0.00	71.12	125.90	66.78	88.83	70.66	52.71	63.93	43.95	60.76	21.53	32.26	67.01	40.91	6.92	813.27
Other outside MK	0.00	0.54	0.56	0.00	1.73	0.59	0.39	0.81	163.72	5.31	4.59	127.54	178.68	252.55	138.95	875.97
TOTAL	0.00	71.66	126.46	66.78	90.57	71.26	53.10	64.74	207.67	66.07	26.12	159.80	245.69	293.46	145.87	1689.24

Source: Table 3A and 13.

Table 15: Design year convenience goods turnovers 2032 (£M) - with Milton Keynes East

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2032	4.14	71.66	126.46	66.78	90.57	71.26	53.10	64.74	207.67	66.07	26.12	159.80	245.69	293.46	145.87	1693.39
Milton Keynes East	2.50	0.00	0.00	0.00	0.62	0.62	0.00	0.00	0.00	7.49	0.62	0.62	0.00	0.00	0.00	12.48
Commitments	0.00	1.90	12.75	2.54	0.61	0.63	6.32	6.32	24.88	1.10	0.62	0.00	0.00	2.53	2.49	62.69
Completions	0.00	8.84	12.32	7.05	10.09	7.98	5.40	6.50	2.17	6.35	2.57	3.61	7.23	3.55	0.85	84.50
Designated Centres																
Central Milton Keynes	0.16	2.01	8.62	11.21	4.30	9.08	8.20	6.89	2.73	3.65	2.40	0.99	4.59	1.19	0.00	66.03
Kingston DC	0.33	0.52	0.82	6.43	28.42	7.78	1.37	0.27	0.18	6.58	1.93	8.41	15.57	0.89	0.00	79.50
Westcroft DC	0.00	5.58	36.92	3.13	1.66	1.06	1.02	2.24	0.00	0.76	0.00	0.83	1.53	8.91	1.47	65.12
Bletchley DC	0.00	18.18	3.18	3.07	4.23	0.37	0.55	0.43	0.00	0.12	0.00	0.00	1.53	3.86	0.00	35.52
Wolverton DC	0.25	0.00	0.41	0.30	1.90	1.80	7.10	24.36	5.82	9.38	0.15	0.00	0.00	0.30	0.00	51.76
Newport Pagnell TC	0.25	0.00	0.00	0.00	0.00	1.91	0.09	0.30	0.00	4.67	0.00	0.00	0.00	0.00	0.00	7.21
Olney TC	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.00	9.20	0.00	0.00	0.00	0.00	9.65
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.94	0.41	0.37	0.00	0.00	0.00	0.00	0.00	4.73
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	13.45	0.00	0.00	14.12
Local centres	0.08	1.97	29.65	15.60	13.58	22.95	17.82	5.09	2.09	11.31	2.42	7.79	1.05	2.73	1.81	135.93
Out of centre																
Asda, Bletchley	0.16	10.67	8.73	7.05	4.32	6.98	1.52	2.72	2.65	3.66	0.00	1.78	3.23	4.37	0.00	57.83
Costco, Kingston	0.02	0.00	0.22	0.25	0.78	1.44	0.00	0.00	0.20	0.30	0.25	3.34	3.62	1.20	0.30	11.90
M&S, Bletchley	0.00	0.47	2.33	0.62	0.43	0.39	0.83	0.69	0.00	0.19	0.03	0.67	1.55	0.90	0.00	9.11
Tesco Extra, Bletchley	0.02	16.09	5.71	1.32	1.75	1.40	0.62	0.00	0.93	0.76	0.07	0.97	5.47	2.33	0.00	37.42
Waitrose, Oakgrove	0.16	0.77	3.11	4.61	14.86	4.49	1.55	2.04	1.40	4.01	0.75	1.30	4.72	3.79	0.00	47.56
Other out of centre	0.05	4.11	1.12	3.60	1.29	1.79	0.31	2.13	0.16	0.72	0.65	1.78	3.48	4.37	0.00	25.56
MK Total	4.06	71.12	125.90	66.78	88.84	70.67	52.71	63.93	43.97	61.40	21.64	32.76	67.01	40.91	6.92	818.63
Other outside MK	0.08	0.54	0.56	0.00	1.72	0.59	0.39	0.81	163.70	4.67	4.48	127.04	178.68	252.55	138.95	874.76
TOTAL	4.14	71.66	126.46	66.78	90.57	71.26	53.10	64.74	207.67	66.07	26.12	159.80	245.69	293.46	145.87	1693.39

Source: Table 14 and 10C.

Table 16: Horison year convenience goods turnovers 2037 (£M) - with Milton Keynes East

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2037	5.70	72.33	127.63	67.40	91.40	71.91	53.59	65.34	213.59	68.85	26.36	163.18	250.88	301.87	149.17	1729.21
Milton Keynes East	3.44	0.00	0.00	0.00	0.63	0.63	0.00	0.00	0.00	7.80	0.63	0.64	0.00	0.00	0.00	13.77
Commitments	0.00	1.92	12.87	2.57	0.61	0.63	6.38	6.38	25.59	1.14	0.62	0.00	0.00	2.60	2.55	63.86
Completions	0.00	8.92	12.43	7.11	10.19	8.05	5.45	6.56	2.23	6.62	2.59	3.69	7.38	3.65	0.87	85.74
Designated Centres																
Central Milton Keynes	0.23	2.03	8.70	11.32	4.34	9.16	8.28	6.95	2.81	3.80	2.42	1.01	4.69	1.22	0.00	66.96
Kingston DC	0.45	0.52	0.83	6.49	28.69	7.85	1.39	0.27	0.19	6.86	1.95	8.59	15.90	0.92	0.00	80.88
Westcroft DC	0.00	5.64	37.27	3.16	1.67	1.07	1.03	2.26	0.00	0.80	0.00	0.85	1.56	9.17	1.50	65.97
Bletchley DC	0.00	18.35	3.21	3.10	4.27	0.38	0.55	0.43	0.00	0.12	0.00	0.00	1.56	3.97	0.00	35.95
Wolverton DC	0.34	0.00	0.41	0.30	1.92	1.82	7.17	24.58	5.98	9.77	0.15	0.00	0.00	0.31	0.00	52.76
Newport Pagnell TC	0.34	0.00	0.00	0.00	0.00	1.92	0.09	0.30	0.00	4.86	0.00	0.00	0.00	0.00	0.00	7.52
Olney TC	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.37	0.00	9.28	0.00	0.00	0.00	0.00	9.77
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.98	0.43	0.39	0.00	0.00	0.00	0.00	0.00	4.79
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	13.73	0.00	0.00	14.41
Local centres	0.11	1.99	29.93	15.74	13.70	23.16	17.99	5.14	2.14	11.79	2.44	7.96	1.07	2.80	1.85	137.82
Out of centre																
Asda, Bletchley	0.23	10.76	8.81	7.11	4.36	7.04	1.53	2.75	2.72	3.81	0.00	1.81	3.30	4.50	0.00	58.74
Costco, Kingston	0.02	0.00	0.22	0.25	0.78	1.45	0.00	0.00	0.20	0.31	0.26	3.41	3.70	1.23	0.30	12.14
M&S, Bletchley	0.00	0.48	2.36	0.63	0.44	0.40	0.84	0.70	0.00	0.19	0.03	0.68	1.58	0.93	0.00	9.24
Tesco Extra, Bletchley	0.02	16.24	5.76	1.34	1.76	1.41	0.62	0.00	0.96	0.79	0.07	0.99	5.58	2.40	0.00	37.94
Waitrose, Oakgrover	0.23	0.78	3.14	4.65	14.99	4.54	1.56	2.06	1.44	4.18	0.75	1.32	4.82	3.90	0.00	48.37
Other out of centre	0.07	4.15	1.13	3.64	1.30	1.80	0.31	2.15	0.16	0.75	0.65	1.81	3.55	4.50	0.00	25.98
MK Total	5.59	71.78	127.07	67.40	89.67	71.32	53.19	64.53	45.23	63.99	21.84	33.45	68.43	42.08	7.07	832.63
Other outside MK	0.11	0.55	0.56	0.00	1.74	0.59	0.40	0.81	168.36	4.86	4.52	129.73	182.45	259.79	142.10	896.58
TOTAL	5.70	72.33	127.63	67.40	91.40	71.91	53.59	65.34	213.59	68.85	26.36	163.18	250.88	301.87	149.17	1729.21

Source: Table 3A and 15.

Table 17: Horison year convenience goods turnovers 2048 (£M) - with Milton Keynes East

	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2048	15.10	74.40	131.30	69.33	94.03	73.98	55.13	67.22	225.94	71.80	27.12	170.57	262.24	318.91	156.69	1813.75
Milton Keynes East	9.10	0.00	0.00	0.00	0.65	0.65	0.00	0.00	0.00	8.14	0.65	0.67	0.00	0.00	0.00	19.84
Commitments	0.00	1.97	13.24	2.64	0.63	0.65	6.56	6.56	27.07	1.19	0.64	0.00	0.00	2.74	2.68	66.59
Completions	0.00	9.18	12.79	7.31	10.48	8.28	5.61	6.75	2.36	6.90	2.67	3.85	7.72	3.86	0.91	88.67
Designated Centres																
Central Milton Keynes	0.60	2.09	8.95	11.64	4.47	9.43	8.52	7.15	2.97	3.97	2.49	1.06	4.90	1.29	0.00	69.51
Kingston DC	1.20	0.54	0.85	6.68	29.51	8.08	1.43	0.28	0.20	7.15	2.00	8.98	16.62	0.97	0.00	84.47
Westcroft DC	0.00	5.80	38.34	3.25	1.72	1.10	1.06	2.33	0.00	0.83	0.00	0.88	1.63	9.69	1.58	68.21
Bletchley DC	0.00	18.88	3.30	3.19	4.39	0.39	0.57	0.44	0.00	0.13	0.00	0.00	1.63	4.20	0.00	37.12
Wolverton DC	0.90	0.00	0.43	0.31	1.98	1.87	7.38	25.29	6.33	10.19	0.15	0.00	0.00	0.32	0.00	55.14
Newport Pagnell TC	0.90	0.00	0.00	0.00	0.00	1.98	0.10	0.31	0.00	5.07	0.00	0.00	0.00	0.00	0.00	8.36
Olney TC	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.40	0.00	9.55	0.00	0.00	0.00	0.00	10.25
Stony Stratford TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.09	0.45	0.41	0.00	0.00	0.00	0.00	0.00	4.95
Woburn Sands TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72	14.35	0.00	0.00	15.07
Local centres	0.30	2.05	30.79	16.20	14.10	23.83	18.50	5.29	2.27	12.29	2.51	8.32	1.12	2.96	1.94	142.45
Out of centre																
Asda, Bletchley	0.60	11.07	9.07	7.32	4.49	7.24	1.57	2.83	2.88	3.97	0.00	1.90	3.45	4.75	0.00	61.13
Costco, Kingston	0.06	0.00	0.23	0.26	0.80	1.49	0.00	0.00	0.21	0.32	0.26	3.57	3.86	1.30	0.32	12.70
M&S, Bletchley	0.00	0.49	2.42	0.64	0.45	0.41	0.86	0.72	0.00	0.20	0.03	0.71	1.66	0.98	0.00	9.57
Tesco Extra, Bletchley	0.06	16.70	5.92	1.38	1.82	1.45	0.64	0.00	1.02	0.82	0.07	1.04	5.83	2.53	0.00	39.28
Waitrose, Oakgrover	0.60	0.80	3.23	4.79	15.42	4.67	1.61	2.12	1.52	4.36	0.77	1.38	5.04	4.12	0.00	50.43
Other out of centre	0.18	4.27	1.17	3.74	1.34	1.85	0.32	2.21	0.17	0.78	0.67	1.90	3.71	4.75	0.00	27.07
MK Total	14.80	73.84	130.72	69.33	92.24	73.37	54.72	66.38	47.84	66.73	22.46	34.97	71.53	44.46	7.43	870.81
Other outside MK	0.30	0.56	0.58	0.00	1.79	0.61	0.41	0.84	178.10	5.07	4.65	135.60	190.71	274.45	149.27	942.94
TOTAL	15.10	74.40	131.30	69.33	94.03	73.98	55.13	67.22	225.94	71.80	27.12	170.57	262.24	318.91	156.69	1813.75

Source: Table 3A and 15.

Table 18: Commitments convenience goods impact summary 2026

	Base year 2019 turnover £M	Design year 2026 turnover no commitments £M	Design year 2026 turnover with commitment £M	% Impact	Base v Design year % increase
Commitments	n/a	n/a	60.54	n/a	n/a
Completions	80.75	86.53	82.29	-4.9%	1.9%
Designated Centres					
Central Milton Keynes	63.52	68.12	63.82	-6.3%	0.5%
Kingston DC	75.11	80.10	78.98	-1.4%	5.2%
Westcroft DC	62.49	67.19	62.21	-7.4%	-0.4%
Bletchley DC	32.93	35.19	34.14	-3.0%	3.7%
Wolverton DC	52.23	56.08	50.89	-9.3%	-2.6%
Newport Pagnell TC	6.56	7.19	7.13	-0.8%	8.8%
Olney TC	9.08	9.70	9.38	-3.3%	3.3%
Stony Stratford TC	4.41	4.73	4.57	-3.3%	3.6%
Woburn Sands TC	12.61	13.49	13.49	0.0%	7.0%
Local centres	124.44	133.59	130.97	-2.0%	5.2%
Out of centre					
Asda, Bletchley	57.01	61.11	56.14	-8.1%	-1.5%
Costco, Kingston	10.82	11.56	11.48	-0.7%	6.1%
M&S, Bletchley	8.46	9.07	8.74	-3.7%	3.3%
Tesco Extra, Bletchley	35.88	38.42	35.96	-6.4%	0.2%
Waitrose, Oakgrover	46.12	49.20	46.37	-5.8%	0.5%
Other out of centre	24.26	25.98	24.64	-5.2%	1.5%
MK Total	706.69	757.25	781.73	-4.8%	2.1%
Other outside MK	818.46	867.52	843.04	-2.8%	3.0%
Total	1,525.14	1,624.77	1,624.77		

Source: Tables 8 to 13

Table 19: Milton Keynes East convenience goods impact summary 2032

	Base year 2019 turnover £M	Design year 2032 turnover without MKE £M	Design year 2032 turnover with MKE £M	% Impact	Base v Design year % increase
MK East	n/a	n/a	12.48	n/a	n/a
Commitments	n/a	62.86	62.69	-0.3%	n/a
Completions	80.75	85.60	84.50	-1.3%	4.6%
Designated Centres					
Central Milton Keynes	63.52	66.55	66.03	-0.8%	4.0%
Kingston DC	75.11	81.42	79.50	-2.4%	5.8%
Westcroft DC	62.49	65.21	65.12	-0.1%	4.2%
Bletchley DC	32.93	35.55	35.52	-0.1%	7.9%
Wolverton DC	52.23	52.84	51.76	-2.0%	-0.9%
Newport Pagnell TC	6.56	7.39	7.21	-2.4%	10.0%
Olney TC	9.08	9.79	9.65	-1.5%	6.2%
Stony Stratford TC	4.41	4.76	4.73	-0.7%	7.2%
Woburn Sands TC	12.61	14.12	14.12	0.0%	11.9%
Local centres	124.44	136.47	135.93	-0.4%	9.2%
Out of centre					
Asda, Bletchley	57.01	58.51	57.83	-1.2%	1.4%
Costco, Kingston	10.82	11.97	11.90	-0.5%	10.0%
M&S, Bletchley	8.46	9.13	9.11	-0.3%	7.7%
Tesco Extra, Bletchley	35.88	37.54	37.42	-0.3%	4.3%
Waitrose, Oakgrove	46.12	47.86	47.56	-0.6%	3.1%
Other out of centre	24.26	25.71	25.56	-0.6%	5.3%
MK Total	706.69	813.30	818.63	-0.9%	5.2%
Other outside MK	818.46	875.95	874.76	-0.1%	6.9%
Total	1,525.14	1,689.24	1,693.39		

Source: Tables 6 to 15

Table 20: Milton Keynes East horizon convenience goods turnover at 2037 and 2048

	Base 2019 turnover £M	Design year 2037 turnover with MKE £M	Design year 2048 turnover with MKE £M	Base v 2037 % increase	Base v 2048 % increase
MK East	n/a	13.77	19.84	n/a	n/a
Commitments	n/a	63.86	66.59	n/a	n/a
Completions	80.75	85.74	88.67	6.2%	9.8%
Designated Centres					
Central Milton Keynes	63.52	66.96	69.51	5.4%	9.4%
Kingston DC	75.11	80.88	84.47	7.7%	12.5%
Westcroft DC	62.49	65.97	68.21	5.6%	9.2%
Bletchley DC	32.93	35.95	37.12	9.1%	12.7%
Wolverton DC	52.23	52.76	55.14	1.0%	5.6%
Newport Pagnell TC	6.56	7.52	8.36	14.7%	27.5%
Olney TC	9.08	9.77	10.25	7.6%	12.8%
Stony Stratford TC	4.41	4.79	4.95	8.6%	12.2%
Woburn Sands TC	12.61	14.41	15.07	14.3%	19.4%
Local centres	124.44	137.82	142.45	10.8%	14.5%
Out of centre					
Asda, Bletchley	57.01	58.74	61.13	3.0%	7.2%
Costco, Kingston	10.82	12.14	12.70	12.3%	17.4%
M&S, Bletchley	8.46	9.24	9.57	9.3%	13.2%
Tesco Extra, Bletchley	35.88	37.94	39.28	5.7%	9.5%
Waitrose, Oakgrover	46.12	48.37	50.43	4.9%	9.3%
Other out of centre	24.26	25.98	27.07	7.1%	11.6%
MK Total	706.69	832.63	870.81	6.8%	11.0%
Other outside MK	818.46	896.58	942.94	9.5%	15.2%
Total	1,525.14	1,729.21	1,813.75		

Source: Tables 6 to 17

Appendix 3 Comparison assessment

Table 1: Study Area Population (with Milton Keynes East)

Zone	2017	2019	2026	2032	2037	2048
Milton Keynes East development	0	0	0	1,920	2,640	6,960
Zone 1 - Bletchley	30,903	31,621	33,805	35,564	35,829	36,723
Zone 2 - Milton Keynes West	53,666	55,085	59,482	63,056	63,527	65,112
Zone 3 - Milton Keynes Central	29,766	30,561	32,938	34,837	35,098	35,973
Zone 4 - Milton Keynes South East	39,473	40,927	42,864	43,445	43,769	44,861
Zone 5 - Milton Keynes North East	29,134	29,827	31,926	33,613	33,864	34,708
Zone 6 - Milton Keynes North West	22,200	22,763	24,355	25,589	25,780	26,423
Zone 7 - Stony Stratford/Wolverton	27,871	28,585	30,599	32,160	32,400	33,208
Zone 8 - Buckingham/Brackley/Towcester	83,744	84,927	88,631	91,657	94,103	99,177
Zone 9 - Newport Pagnell	24,511	24,707	27,380	28,407	29,552	30,704
Zone 10 - Olney	9,611	9,835	10,504	11,040	11,123	11,400
Zone 11 - Ampthill/Flitwick/Cranfield	59,450	60,763	65,027	68,569	69,893	72,789
Zone 12 - Leighton Buzzard	91,919	93,994	100,497	105,811	107,854	112,325
Zone 13 - Aylesbury	116,707	119,255	127,044	133,333	136,914	144,112
Zone 14 - Bicester	58,853	59,750	62,529	64,789	66,138	69,219
Total	677,808	692,598	737,581	773,790	788,484	823,693

*Sources:**Milton Keynes Retail Capacity and Leisure Study 2018 (population to 2031)**ONS 2018 based population projections 2031 to 2043 (extrapolated to 2048)**Milton Keynes East: 800 homes by 2032; 1,100 by 2037 and 2,900 by 2048 (2.4 people per home)*

Table 2A: Comparison goods expenditure £ per person (2019 prices)

Zone	2017 (inc. SFT)	2017 (excl. SFT)	2019 (excl. SFT)	2026 (excl. SFT)	2032 (excl. SFT)	2037 (excl. SFT)	2048 (excl. SFT)
Milton Keynes East development	3,768	3,218	3,353	3,460	3,991	4,541	5,993
Zone 1 - Bletchley	3,089	2,638	2,748	2,837	3,272	3,723	4,913
Zone 2 - Milton Keynes West	3,644	3,112	3,242	3,347	3,860	4,391	5,796
Zone 3 - Milton Keynes Central	2,691	2,298	2,394	2,471	2,850	3,243	4,280
Zone 4 - Milton Keynes South East	3,877	3,311	3,449	3,561	4,106	4,672	6,166
Zone 5 - Milton Keynes North East	3,586	3,062	3,191	3,293	3,798	4,322	5,703
Zone 6 - Milton Keynes North West	3,431	2,930	3,053	3,151	3,634	4,135	5,457
Zone 7 - Stony Stratford/Wolverton	3,321	2,836	2,955	3,050	3,518	4,002	5,282
Zone 8 - Buckingham/Brackley/Towcester	4,286	3,660	3,813	3,936	4,540	5,165	6,817
Zone 9 - Newport Pagnell	4,139	3,535	3,683	3,801	4,384	4,988	6,583
Zone 10 - Olney	4,415	3,770	3,928	4,055	4,676	5,321	7,022
Zone 11 - Ampthill/Flitwick/Cranfield	4,122	3,520	3,667	3,786	4,366	4,967	6,556
Zone 12 - Leighton Buzzard	4,193	3,581	3,731	3,851	4,441	5,053	6,669
Zone 13 - Aylesbury	3,852	3,290	3,427	3,538	4,080	4,642	6,126
Zone 14 - Bicester	4,111	3,511	3,658	3,775	4,354	4,954	6,538

Table 2B: Local catchment comparison goods expenditure £ per person (2019 prices)

Zone	2019 (excl. SFT)	2026 (excl. SFT)	2032 (excl. SFT)	2037 (excl. SFT)	2048 (excl. SFT)
Milton Keynes East development	3,353	3,460	3,991	4,541	5,993
Zone 9 - Newport Pagnell	3,683	3,801	4,384	4,988	6,583

Sources:

Milton Keynes Retail Capacity and Leisure Study 2018 (2017 base year expenditure adjusted to 2019 prices)
Experian expenditure and SFT projections - Retail Planner Briefing Note 18 - October 2020

Table 3A: Total comparison goods expenditure (£m)

Zone	2017	2019	2026	2032	2037	2048
Milton Keynes East development	0.00	0.00	0.00	7.66	11.99	41.71
Zone 1 - Bletchley	81.52	86.91	95.90	116.36	133.38	180.42
Zone 2 - Milton Keynes West	167.01	178.59	199.06	243.38	278.97	377.36
Zone 3 - Milton Keynes Central	68.41	73.17	81.40	99.30	113.82	153.96
Zone 4 - Milton Keynes South East	130.69	141.18	152.62	178.40	204.50	276.62
Zone 5 - Milton Keynes North East	89.22	95.17	105.14	127.67	146.34	197.96
Zone 6 - Milton Keynes North West	65.05	69.49	76.74	92.99	106.59	144.19
Zone 7 - Stony Stratford/Wolverton	79.05	84.46	93.33	113.12	129.67	175.40
Zone 8 - Buckingham/Brackley/Towcester	306.52	323.86	348.87	416.09	486.05	676.06
Zone 9 - Newport Pagnell	86.64	90.99	104.07	124.54	147.40	202.12
Zone 10 - Olney	36.24	38.63	42.59	51.63	59.18	80.05
Zone 11 - Ampthill/Flitwick/Cranfield	209.28	222.85	246.17	299.37	347.19	477.20
Zone 12 - Leighton Buzzard	329.15	350.66	386.99	469.93	544.99	749.07
Zone 13 - Aylesbury	383.92	408.72	449.43	544.00	635.57	882.90
Zone 14 - Bicester	206.62	218.54	236.08	282.11	327.66	452.58
Total	2,239.31	2,383.21	2,618.39	3,166.54	3,673.30	5,067.62

Source: Tables 1A and 2A

Table 3B: Local catchment comparison goods expenditure (£m)

Zone	2019	2026	2032	2037	2048
Milton Keynes East development	0.00	0.00	7.66	11.99	41.71
Zone 9 - Newport Pagnell	90.99	104.07	124.54	147.40	202.12
Total	90.99	104.07	132.20	159.39	243.83

Source: Tables 1B and 2B

Table 4A: Retained comparison goods expenditure (% of total)

Zone	MKE	Zone 9	Inflow
Milton Keynes East development	25%	2%	10%

Table 4B: Retained comparison goods expenditure (£M)

By year	MKE	Zone 9	Inflow	Total
2026	0.00	2.08	0.23	2.31
2032	1.92	2.49	0.49	4.90
2037	3.00	2.95	0.66	6.61
2048	10.43	4.04	1.61	16.08

Source: Table 3A and 4A

Table 5: Comparison goods floorspace capacity (sq.m)

By year	Retained expenditure £M	Turnover density new floorspace £ per sq.m net	Sales floorspace capacity sq.m net	Gross (1) floorspace sq.m
2026	2.31	5,000	463	578
2032	4.90	5,819	841	1,052
2037	6.61	6,615	999	1,248
2048	16.08	7,521	2,138	2,672

Sources:

Table 4B

Milton Keynes Retail Capacity and Leisure Study 2018

Experian recommended growth in turnover densities (Briefing Note 18)

(1) Net to gross ration - 80%

Table 6: Base year comparison goods market shares (%)

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Designated Centres															
Central Milton Keynes	65.0%	45.5%	67.0%	64.2%	61.3%	70.2%	65.3%	62.9%	35.5%	62.2%	62.6%	39.0%	39.3%	27.5%	22.3%
Kingston DC	8.0%	0.0%	0.7%	9.5%	15.0%	5.3%	1.4%	0.5%	0.0%	6.0%	3.2%	7.4%	2.7%	0.1%	0.1%
Westcroft DC	0.0%	1.3%	5.8%	1.0%	0.6%	0.2%	0.0%	1.4%	0.0%	0.3%	0.0%	0.0%	0.2%	1.0%	0.0%
Bletchley DC	0.0%	28.7%	5.1%	2.6%	2.0%	0.4%	3.5%	2.3%	3.2%	1.2%	0.2%	0.8%	5.6%	1.6%	0.5%
Wolverton DC	2.0%	0.2%	0.3%	0.1%	0.0%	0.4%	4.1%	8.4%	0.6%	3.2%	0.2%	0.0%	0.0%	0.0%	0.0%
Newport Pagnell TC	5.0%	0.0%	0.0%	0.3%	0.0%	1.0%	0.0%	0.3%	0.0%	5.3%	1.2%	0.0%	0.0%	0.0%	0.0%
Olney TC	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.0%	15.9%	0.4%	0.0%	0.0%	0.0%
Stony Stratford TC	1.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.0%	5.9%	0.2%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Woburn Sands TC	0.0%	0.2%	0.0%	0.0%	0.2%	0.0%	0.0%	0.7%	0.0%	0.1%	0.2%	0.0%	0.4%	0.0%	0.0%
Local centres	1.0%	0.1%	1.7%	3.8%	1.1%	2.3%	0.1%	0.5%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.1%
Out of centre	15.0%	22.9%	17.9%	17.7%	18.4%	19.4%	24.8%	16.1%	10.1%	14.8%	7.8%	3.3%	17.6%	5.9%	3.9%
MK Total	98.0%	98.9%	98.5%	99.3%	98.7%	99.3%	99.2%	99.0%	49.8%	95.6%	91.4%	50.9%	65.8%	36.1%	26.9%
Other outside MK	2.0%	1.1%	1.5%	0.7%	1.3%	0.7%	0.8%	1.0%	50.2%	4.4%	8.6%	49.1%	34.2%	63.9%	73.1%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Milton Keynes Retail Capacity and Leisure Study 2018 (Table 1, Appendix 16) - 2017 base year market shares excluding SFT.

Table 7: Base year comparison goods turnover at 2019 (£M)

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2019	0.00	86.91	178.59	73.17	141.18	95.17	69.49	84.46	323.86	90.99	38.63	222.85	350.66	408.72	218.54	2383.21
Designated Centres																
Central Milton Keynes	0.00	39.54	119.66	46.98	86.54	66.81	45.38	53.13	114.97	56.59	24.18	86.91	137.81	112.40	48.74	1039.62
Kingston DC	0.00	0.00	1.25	6.95	21.18	5.04	0.97	0.42	0.00	5.46	1.24	16.49	9.47	0.41	0.22	69.10
Westcroft DC	0.00	1.13	10.36	0.73	0.85	0.19	0.00	1.18	0.00	0.27	0.00	0.00	0.70	4.09	0.00	19.50
Bletchley DC	0.00	24.94	9.11	1.90	2.82	0.38	2.43	1.94	10.36	1.09	0.08	1.78	19.64	6.54	1.09	84.12
Wolverton DC	0.00	0.17	0.54	0.07	0.00	0.38	2.85	7.09	1.94	2.91	0.08	0.00	0.00	0.00	0.00	16.04
Newport Pagnell TC	0.00	0.00	0.00	0.22	0.00	0.95	0.00	0.25	0.00	4.82	0.46	0.00	0.00	0.00	0.00	6.71
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.65	0.91	6.14	0.89	0.00	0.00	0.00	8.59
Stony Stratford TC	0.00	0.00	0.00	0.07	0.14	0.10	0.00	4.98	0.65	1.18	0.00	0.00	0.00	0.00	0.00	7.12
Woburn Sands TC	0.00	0.17	0.00	0.00	0.28	0.00	0.00	0.59	0.00	0.09	0.08	0.00	1.40	0.00	0.00	2.62
Local centres	0.00	0.09	3.04	2.78	1.55	2.19	0.07	0.42	0.00	0.18	0.04	0.00	0.00	0.00	0.22	10.58
Out of centre	0.00	19.90	31.97	12.95	25.98	18.46	17.23	13.60	32.71	13.47	3.01	7.35	61.72	24.11	8.52	290.99
MK Total	0.00	85.95	175.91	72.66	139.34	94.50	68.93	83.62	161.28	86.98	35.31	113.43	230.73	147.55	58.79	1554.98
Other outside MK	0.00	0.96	2.68	0.51	1.84	0.67	0.56	0.84	162.58	4.00	3.32	109.42	119.93	261.17	159.76	828.22
TOTAL	0.00	86.91	178.59	73.17	141.18	95.17	69.49	84.46	323.86	90.99	38.63	222.85	350.66	408.72	218.54	2383.21

Source: Table 3A and 6.

Table 8: Future comparison goods turnovers 2026 (£M) - without commitments

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2026	0.00	95.90	199.06	81.40	152.62	105.14	76.74	93.33	348.87	104.07	42.59	246.17	386.99	449.43	236.08	2618.39
Designated Centres																
Central Milton Keynes	0.00	43.63	133.37	52.26	93.56	73.81	50.11	58.70	123.85	64.73	26.66	96.00	152.09	123.59	52.65	1145.02
Kingston DC	0.00	0.00	1.39	7.73	22.89	5.57	1.07	0.47	0.00	6.24	1.36	18.22	10.45	0.45	0.24	76.09
Westcroft DC	0.00	1.25	11.55	0.81	0.92	0.21	0.00	1.31	0.00	0.31	0.00	0.00	0.77	4.49	0.00	21.62
Bletchley DC	0.00	27.52	10.15	2.12	3.05	0.42	2.69	2.15	11.16	1.25	0.09	1.97	21.67	7.19	1.18	92.61
Wolverton DC	0.00	0.19	0.60	0.08	0.00	0.42	3.15	7.84	2.09	3.33	0.09	0.00	0.00	0.00	0.00	17.79
Newport Pagnell TC	0.00	0.00	0.00	0.24	0.00	1.05	0.00	0.28	0.00	5.52	0.51	0.00	0.00	0.00	0.00	7.60
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.70	1.04	6.77	0.98	0.00	0.00	0.00	9.50
Stony Stratford TC	0.00	0.00	0.00	0.08	0.15	0.11	0.00	5.51	0.70	1.35	0.00	0.00	0.00	0.00	0.00	7.90
Woburn Sands TC	0.00	0.19	0.00	0.00	0.31	0.00	0.00	0.65	0.00	0.10	0.09	0.00	1.55	0.00	0.00	2.89
Local centres	0.00	0.10	3.38	3.09	1.68	2.42	0.08	0.47	0.00	0.21	0.04	0.00	0.00	0.00	0.24	11.70
Out of centre	0.00	21.96	35.63	14.41	28.08	20.40	19.03	15.03	35.24	15.40	3.32	8.12	68.11	26.52	9.21	320.46
MK Total	0.00	94.85	196.07	80.83	150.64	104.41	76.13	92.39	173.74	99.50	38.93	125.30	254.64	162.25	63.50	1713.16
Other outside MK	0.00	1.05	2.99	0.57	1.98	0.74	0.61	0.93	175.13	4.58	3.66	120.87	132.35	287.19	172.57	905.23
TOTAL	0.00	95.90	199.06	81.40	152.62	105.14	76.74	93.33	348.87	104.07	42.59	246.17	386.99	449.43	236.08	2618.39

Source: Table 3A and 6.

Table 9A: Commitments - comparison goods turnover £M at 2026

	Sales floorspaces sq.m net	Turnover density £ per sq.m net	Expected turnover £M
CMK The Point	14,420	6,000	86.52
Midsummer Place	2,800	6,000	16.80
Lloyds Court, Silbury Boulevard	4,800	5,000	24.00
Tattenhoe Park new local centre	700	5,000	3.50
Western Expansion Area - anchor store	1,600	5,000	8.00
Western Expansion Area - High Street	1,200	5,000	6.00
Western Expansion Area - Local Centre	150	5,000	0.75
Total	25,670		145.57

Sources: MKBC planning application records and Milton Keynes Retail Capacity and Leisure Study 2018

Table 9B: Milton Keynes East - comparison goods turnover £M at 2032

	Sales floorspaces sq.m net	Company turnover density £ per sq.m net	Expected turnover £M
Community hub	1,600	5,816	9.31

Notes - maximum floorspace parameter for community hub 2,000 sq.m gross (1,600 sq.m net)

Table 10A: Commitments - comparison goods turnover trade draw at 2026

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	0%	7%	11%	5%	9%	6%	6%	5%	11%	5%	1%	2%	21%	8%	3%	100%
Turnover £M	0.00	10.19	16.01	7.28	13.10	8.73	8.73	7.28	16.01	7.28	1.46	2.91	30.57	11.65	4.37	145.57

Source: Table 7A/7B and Lichfields' estimates based on existing shopping patterns

Table 10B: Milton Keynes East - comparison goods turnover trade draw at 2032

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	35%	0%	0%	0%	10%	10%	0%	0%	0%	43%	1%	1%	0%	0%	0%	100%
Turnover £M	3.26	0.00	0.00	0.00	0.93	0.93	0.00	0.00	0.00	4.00	0.09	0.09	0.00	0.00	0.00	9.31

Source: Lichfields' estimates based on existing shopping patterns

Table 11: Future comparison goods turnovers 2026 (£M) - with commitments

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2026	0.00	95.90	199.06	81.40	152.62	105.14	76.74	93.33	348.87	104.07	42.59	246.17	386.99	449.43	236.08	2618.39
Commitments	0.00	10.19	16.01	7.28	13.10	8.73	8.73	7.28	16.01	7.28	1.46	2.91	30.57	11.65	4.37	145.57
Designated Centres																
Central Milton Keynes	0.00	37.26	120.52	46.57	83.60	66.60	43.21	53.08	115.46	59.15	25.54	94.37	134.84	118.57	51.05	1049.83
Kingston DC	0.00	0.00	1.33	7.31	21.67	5.30	1.00	0.44	0.00	5.98	1.33	18.06	9.86	0.44	0.23	72.96
Westcroft DC	0.00	1.16	10.99	0.77	0.87	0.20	0.00	1.24	0.00	0.30	0.00	0.00	0.73	4.40	0.00	20.66
Bletchley DC	0.00	25.51	9.66	2.00	2.89	0.40	2.50	2.04	10.79	1.20	0.08	1.95	20.44	7.04	1.16	87.68
Wolverton DC	0.00	0.18	0.57	0.08	0.00	0.40	2.93	7.46	2.02	3.19	0.08	0.00	0.00	0.00	0.00	16.91
Newport Pagnell TC	0.00	0.00	0.00	0.23	0.00	1.00	0.00	0.27	0.00	5.28	0.50	0.00	0.00	0.00	0.00	7.28
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	1.00	6.63	0.98	0.00	0.00	0.00	9.28
Stony Stratford TC	0.00	0.00	0.00	0.08	0.14	0.10	0.00	5.24	0.67	1.29	0.00	0.00	0.00	0.00	0.00	7.53
Woburn Sands TC	0.00	0.18	0.00	0.00	0.29	0.00	0.00	0.62	0.00	0.10	0.08	0.00	1.46	0.00	0.00	2.73
Local centres	0.00	0.09	3.22	2.92	1.59	2.30	0.07	0.44	0.00	0.20	0.04	0.00	0.00	0.00	0.23	11.11
Out of centre	0.00	20.36	33.92	13.62	26.59	19.40	17.72	14.31	34.04	14.74	3.25	8.05	64.25	25.98	9.07	305.30
MK Total	0.00	94.92	196.22	80.86	150.74	104.44	76.17	92.44	179.67	99.69	39.01	126.33	262.15	168.08	66.11	1736.83
Other outside MK	0.00	0.98	2.84	0.54	1.88	0.70	0.57	0.89	169.20	4.38	3.59	119.84	124.85	281.35	169.96	881.56
TOTAL	0.00	95.90	199.06	81.40	152.62	105.14	76.74	93.33	348.87	104.07	42.59	246.17	386.99	449.43	236.08	2618.39

Source: Table 3 and 10A.

Table 12: Design year comparison goods turnovers 2032 (£M) - without Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2032	0.00	116.36	243.38	99.30	178.40	127.67	92.99	113.12	416.09	124.54	51.63	299.37	469.93	544.00	282.11	3158.88
Commitments	0.00	12.36	19.58	8.88	15.31	10.61	10.58	8.82	19.10	8.71	1.76	3.54	37.12	14.10	5.22	175.69
Designated Centres																
Central Milton Keynes	0.00	45.21	147.35	56.81	97.72	80.88	52.36	64.34	137.71	70.78	30.96	114.77	163.74	143.52	61.01	1267.15
Kingston DC	0.00	0.00	1.62	8.92	25.34	6.44	1.21	0.54	0.00	7.15	1.62	21.96	11.97	0.53	0.28	87.58
Westcroft DC	0.00	1.40	13.44	0.94	1.01	0.24	0.00	1.51	0.00	0.36	0.00	0.00	0.89	5.33	0.00	25.11
Bletchley DC	0.00	30.96	11.81	2.44	3.38	0.49	3.03	2.48	12.86	1.43	0.10	2.37	24.82	8.53	1.39	106.09
Wolverton DC	0.00	0.22	0.69	0.09	0.00	0.49	3.55	9.05	2.41	3.81	0.10	0.00	0.00	0.00	0.00	20.41
Newport Pagnell TC	0.00	0.00	0.00	0.28	0.00	1.21	0.00	0.32	0.00	6.32	0.61	0.00	0.00	0.00	0.00	8.74
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	1.19	8.04	1.19	0.00	0.00	0.00	11.22
Stony Stratford TC	0.00	0.00	0.00	0.09	0.17	0.12	0.00	6.35	0.80	1.55	0.00	0.00	0.00	0.00	0.00	9.09
Woburn Sands TC	0.00	0.22	0.00	0.00	0.34	0.00	0.00	0.75	0.00	0.12	0.10	0.00	1.77	0.00	0.00	3.30
Local centres	0.00	0.11	3.94	3.57	1.86	2.79	0.09	0.54	0.00	0.24	0.05	0.00	0.00	0.00	0.28	13.46
Out of centre	0.00	24.70	41.47	16.62	31.08	23.56	21.47	17.34	40.60	17.64	3.94	9.80	78.02	31.44	10.84	368.51
MK Total	0.00	115.17	239.90	98.64	176.21	126.82	92.30	112.05	214.29	119.29	47.28	153.63	318.32	203.45	79.01	2096.36
Other outside MK	0.00	1.19	3.47	0.66	2.20	0.85	0.69	1.08	201.80	5.24	4.35	145.74	151.60	340.55	203.10	1062.52
TOTAL	0.00	116.36	243.38	99.30	178.40	127.67	92.99	113.12	416.09	124.54	51.63	299.37	469.93	544.00	282.11	3158.88

Source: Table 3 and 11.

Table 13: Design year comparison goods turnovers 2032 (£M) - with Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2032	7.66	116.36	243.38	99.30	178.40	127.67	92.99	113.12	416.09	124.54	51.63	299.37	469.93	544.00	282.11	3166.54
Milton Keynes East	3.26	0.00	0.00	0.00	0.93	0.93	0.00	0.00	0.00	4.00	0.09	0.09	0.00	0.00	0.00	9.31
Commitments	0.00	12.36	19.58	8.88	15.25	10.55	10.58	8.82	19.10	8.49	1.76	3.54	37.12	14.10	5.22	175.35
Designated Centres																
Central Milton Keynes	2.86	45.21	147.35	56.81	97.11	80.20	52.36	64.34	137.71	68.11	30.90	114.72	163.74	143.52	61.01	1265.94
Kingston DC	0.35	0.00	1.62	8.92	25.23	6.40	1.21	0.54	0.00	6.97	1.62	21.96	11.97	0.53	0.28	87.60
Westcroft DC	0.00	1.40	13.44	0.94	1.01	0.24	0.00	1.51	0.00	0.35	0.00	0.00	0.89	5.33	0.00	25.11
Bletchley DC	0.00	30.96	11.81	2.44	3.37	0.48	3.03	2.48	12.86	1.41	0.10	2.37	24.82	8.53	1.39	106.07
Wolverton DC	0.09	0.22	0.69	0.09	0.00	0.48	3.55	9.05	2.41	3.72	0.10	0.00	0.00	0.00	0.00	20.40
Newport Pagnell TC	0.22	0.00	0.00	0.28	0.00	1.21	0.00	0.32	0.00	6.16	0.61	0.00	0.00	0.00	0.00	8.80
Olney TC	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	1.16	8.02	1.19	0.00	0.00	0.00	11.22
Stony Stratford TC	0.04	0.00	0.00	0.09	0.17	0.12	0.00	6.35	0.80	1.51	0.00	0.00	0.00	0.00	0.00	9.10
Woburn Sands TC	0.00	0.22	0.00	0.00	0.34	0.00	0.00	0.75	0.00	0.12	0.10	0.00	1.77	0.00	0.00	3.30
Local centres	0.04	0.11	3.94	3.57	1.85	2.79	0.09	0.54	0.00	0.24	0.05	0.00	0.00	0.00	0.28	13.49
Out of centre	0.66	24.70	41.47	16.62	30.95	23.43	21.47	17.34	40.60	17.19	3.94	9.79	78.02	31.44	10.84	368.46
MK Total	7.57	115.17	239.90	98.64	176.22	126.82	92.30	112.05	214.29	119.43	47.29	153.67	318.32	203.45	79.01	2104.12
Other outside MK	0.09	1.19	3.47	0.66	2.19	0.85	0.69	1.08	201.80	5.11	4.34	145.70	151.60	340.55	203.10	1062.42
TOTAL	7.66	116.36	243.38	99.30	178.40	127.67	92.99	113.12	416.09	124.54	51.63	299.37	469.93	544.00	282.11	3166.54

Source: Table 12 and 10B.

Table 14: Horison year comparison goods turnovers 2037 (£M) - with Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2037	11.99	133.38	278.97	113.82	204.50	146.34	106.59	129.67	486.05	147.40	59.18	347.19	544.99	635.57	327.66	3673.30
Milton Keynes East	5.10	0.00	0.00	0.00	1.07	1.07	0.00	0.00	0.00	4.74	0.11	0.11	0.00	0.00	0.00	12.18
Commitments	0.00	14.17	22.44	10.18	17.48	12.09	12.13	10.11	22.31	10.05	2.02	4.11	43.05	16.47	6.06	202.67
Designated Centres																
Central Milton Keynes	4.48	51.82	168.91	65.11	111.32	91.93	60.02	73.75	160.86	80.61	35.41	133.05	189.89	167.68	70.86	1465.70
Kingston DC	0.55	0.00	1.86	10.22	28.92	7.34	1.39	0.62	0.00	8.25	1.85	25.47	13.88	0.62	0.32	101.29
Westcroft DC	0.00	1.61	15.40	1.08	1.16	0.28	0.00	1.73	0.00	0.42	0.00	0.00	1.03	6.23	0.00	28.92
Bletchley DC	0.00	35.48	13.54	2.80	3.86	0.56	3.47	2.84	15.03	1.67	0.12	2.75	28.79	9.96	1.61	122.49
Wolverton DC	0.14	0.25	0.80	0.11	0.00	0.55	4.07	10.37	2.82	4.40	0.12	0.00	0.00	0.00	0.00	23.62
Newport Pagnell TC	0.34	0.00	0.00	0.32	0.00	1.38	0.00	0.37	0.00	7.29	0.69	0.00	0.00	0.00	0.00	10.40
Olney TC	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.94	1.37	9.20	1.38	0.00	0.00	0.00	12.96
Stony Stratford TC	0.07	0.00	0.00	0.11	0.19	0.14	0.00	7.28	0.94	1.79	0.00	0.00	0.00	0.00	0.00	10.52
Woburn Sands TC	0.00	0.25	0.00	0.00	0.39	0.00	0.00	0.86	0.00	0.14	0.12	0.00	2.06	0.00	0.00	3.81
Local centres	0.07	0.12	4.51	4.09	2.13	3.19	0.10	0.62	0.00	0.28	0.06	0.00	0.00	0.00	0.32	15.49
Out of centre	1.03	28.31	47.53	19.05	35.48	26.85	24.62	19.88	47.43	20.35	4.51	11.36	90.48	36.74	12.59	426.20
MK Total	11.85	132.02	274.99	113.07	201.99	145.37	105.80	128.43	250.32	141.35	54.20	178.21	369.17	237.69	91.76	2436.24
Other outside MK	0.14	1.36	3.98	0.75	2.51	0.97	0.79	1.23	235.73	6.05	4.98	168.97	175.82	397.87	235.90	1237.06
TOTAL	11.99	133.38	278.97	113.82	204.50	146.34	106.59	129.67	486.05	147.40	59.18	347.19	544.99	635.57	327.66	3673.30

Source: Table 3 and 13.

Table 15: Horison year comparison goods turnovers 2048 (£M) - with Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2048	41.71	180.42	377.36	153.96	276.62	197.96	144.19	175.40	676.06	202.12	80.05	477.20	749.07	882.90	452.58	5067.62
Milton Keynes East	17.73	0.00	0.00	0.00	1.44	1.44	0.00	0.00	0.00	6.49	0.14	0.15	0.00	0.00	0.00	27.40
Commitments	0.00	19.17	30.36	13.77	23.65	16.35	16.41	13.68	31.03	13.78	2.73	5.64	59.17	22.88	8.37	276.99
Designated Centres																
Central Milton Keynes	15.59	70.10	228.48	88.08	150.58	124.35	81.19	99.76	223.74	110.54	47.90	182.87	261.00	232.93	97.87	2014.98
Kingston DC	1.92	0.00	2.51	13.83	39.12	9.92	1.88	0.84	0.00	11.31	2.50	35.00	19.08	0.86	0.45	139.23
Westcroft DC	0.00	2.17	20.83	1.46	1.57	0.38	0.00	2.34	0.00	0.57	0.00	0.00	1.41	8.65	0.00	39.38
Bletchley DC	0.00	48.00	18.32	3.79	5.23	0.75	4.70	3.84	20.90	2.29	0.16	3.78	39.57	13.84	2.23	167.39
Wolverton DC	0.48	0.33	1.08	0.15	0.00	0.75	5.50	14.03	3.92	6.03	0.16	0.00	0.00	0.00	0.00	32.43
Newport Pagnell TC	1.20	0.00	0.00	0.44	0.00	1.87	0.00	0.50	0.00	9.99	0.94	0.00	0.00	0.00	0.00	14.94
Olney TC	0.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31	1.89	12.44	1.89	0.00	0.00	0.00	17.77
Stony Stratford TC	0.24	0.00	0.00	0.15	0.26	0.19	0.00	9.85	1.31	2.45	0.00	0.00	0.00	0.00	0.00	14.44
Woburn Sands TC	0.00	0.33	0.00	0.00	0.52	0.00	0.00	1.17	0.00	0.19	0.16	0.00	2.83	0.00	0.00	5.20
Local centres	0.24	0.17	6.11	5.53	2.87	4.32	0.13	0.84	0.00	0.38	0.08	0.00	0.00	0.00	0.45	21.11
Out of centre	3.60	38.30	64.29	25.77	47.99	36.32	33.30	26.89	65.97	27.90	6.10	15.61	124.36	51.03	17.38	584.82
MK Total	41.23	178.58	371.98	152.94	273.23	196.65	143.11	173.73	348.18	193.83	73.32	244.95	507.42	330.19	126.75	3356.08
Other outside MK	0.48	1.84	5.39	1.02	3.39	1.31	1.07	1.67	327.89	8.30	6.73	232.25	241.66	552.71	325.83	1711.53
TOTAL	41.71	180.42	377.36	153.96	276.62	197.96	144.19	175.40	676.06	202.12	80.05	477.20	749.07	882.90	452.58	5067.62

Source: Table 3 and 14.

Table 16: Commitments comparison goods impact summary 2026

	Base year 2019 turnover £M	Design year 2026 turnover no commitments £M	Design year 2026 turnover with commitment £M	% Impact	Base v Design year % increase
Commitments	n/a	n/a	145.57	n/a	n/a
<i>Designated Centres</i>					
Central Milton Keynes	1,039.62	1,145.02	1,049.83	-8.3%	1.0%
Kingston DC	69.10	76.09	72.96	-4.1%	5.6%
Westcroft DC	19.50	21.62	20.66	-4.4%	5.9%
Bletchley DC	84.12	92.61	87.68	-5.3%	4.2%
Wolverton DC	16.04	17.79	16.91	-4.9%	5.4%
Newport Pagnell TC	6.71	7.60	7.28	-4.3%	8.4%
Olney TC	8.59	9.50	9.28	-2.3%	8.0%
Stony Stratford TC	7.12	7.90	7.53	-4.6%	5.7%
Woburn Sands TC	2.62	2.89	2.73	-5.4%	4.3%
Local centres	10.58	11.70	11.11	-5.0%	5.1%
Out of centre	290.99	320.46	305.30	-4.7%	4.9%
MK Total	1,554.98	1,713.16	1,736.83	-7.1%	2.3%
Other outside MK	828.22	905.23	881.56	-2.6%	6.4%
Total	2,383.21	2,618.39	2,618.39		

Source: Tables 7 to 11

Table 17: Milton Keynes East comparison goods impact summary 2032

	Base year 2019 turnover £M	Design year 2032 turnover without MKE £M	Design year 2032 turnover with MKE £M	% Impact	Base v Design year % increase
MK East	n/a	n/a	9.31	n/a	n/a
Commitments	n/a	175.69	175.35	-0.2%	n/a
Designated Centres					
Central Milton Keynes	1,039.62	1,267.15	1,265.94	-0.1%	21.8%
Kingston DC	69.10	87.58	87.60	0.0%	26.8%
Westcroft DC	19.50	25.11	25.11	0.0%	28.7%
Bletchley DC	84.12	106.09	106.07	0.0%	26.1%
Wolverton DC	16.04	20.41	20.40	-0.1%	27.2%
Newport Pagnell TC	6.71	8.74	8.80	0.6%	31.1%
Olney TC	8.59	11.22	11.22	0.0%	30.6%
Stony Stratford TC	7.12	9.09	9.10	0.0%	27.7%
Woburn Sands TC	2.62	3.30	3.30	-0.1%	26.0%
Local centres	10.58	13.46	13.49	0.2%	27.5%
Out of centre	290.99	368.51	368.46	0.0%	26.6%
MK Total	1,554.98	2,096.36	2,104.12	-0.1%	23.4%
Other outside MK	828.22	1,062.52	1,062.42	0.0%	28.3%
Total	2,383.21	3,158.88	3,166.54		

Source: Tables 7 to 13

Table 18: Milton Keynes East horizon comparison goods turnover at 2037 and 2048

	Base year 2019 turnover	Design year 2037 turnover with MKE	Design year 2043 turnover with MKE	Base v 2037 % increase	Base v 2048 % increase
	£M	£M	£M		
MK East	n/a	12.18	27.40	n/a	n/a
Commitments	n/a	202.67	276.99	n/a	n/a
Designated Centres					
Central Milton Keynes	1,039.62	1,465.70	2,014.98	41.0%	93.8%
Kingston DC	69.10	101.29	139.23	46.6%	101.5%
Westcroft DC	19.50	28.92	39.38	48.3%	101.9%
Bletchley DC	84.12	122.49	167.39	45.6%	99.0%
Wolverton DC	16.04	23.62	32.43	47.2%	102.2%
Newport Pagnell TC	6.71	10.40	14.94	55.0%	122.7%
Olney TC	8.59	12.96	17.77	50.8%	106.8%
Stony Stratford TC	7.12	10.52	14.44	47.7%	102.8%
Woburn Sands TC	2.62	3.81	5.20	45.5%	98.6%
Local centres	10.58	15.49	21.11	46.5%	99.6%
Out of centre	290.99	426.20	584.82	46.5%	101.0%
MK Total	1,554.98	2,436.24	3,356.08	42.9%	96.3%
Other outside MK	828.22	1,237.06	1,711.53	49.4%	106.7%
Total	2,383.21	3,673.30	5,067.62		

Source: Tables 7 to 15

Appendix 4 Food/beverage assessment

Table 1: Study Area Population (with Milton Keynes East)

Zone	2017	2019	2026	2032	2037	2048
Milton Keynes East development	0	0	0	1,920	2,640	6,960
Zone 1 - Bletchley	30,903	31,621	33,805	35,564	35,829	36,723
Zone 2 - Milton Keynes West	53,666	55,085	59,482	63,056	63,527	65,112
Zone 3 - Milton Keynes Central	29,766	30,561	32,938	34,837	35,098	35,973
Zone 4 - Milton Keynes South East	39,473	40,927	42,864	43,445	43,769	44,861
Zone 5 - Milton Keynes North East	29,134	29,827	31,926	33,613	33,864	34,708
Zone 6 - Milton Keynes North West	22,200	22,763	24,355	25,589	25,780	26,423
Zone 7 - Stony Stratford/Wolverton	27,871	28,585	30,599	32,160	32,400	33,208
Zone 8 - Buckingham/Brackley/Towcester	83,744	84,927	88,631	91,657	94,103	99,177
Zone 9 - Newport Pagnell	24,511	24,707	27,380	28,407	29,552	30,704
Zone 10 - Olney	9,611	9,835	10,504	11,040	11,123	11,400
Zone 11 - Ampthill/Flitwick/Cranfield	59,450	60,763	65,027	68,569	69,893	72,789
Zone 12 - Leighton Buzzard	91,919	93,994	100,497	105,811	107,854	112,325
Zone 13 - Aylesbury	116,707	119,255	127,044	133,333	136,914	144,112
Zone 14 - Bicester	58,853	59,750	62,529	64,789	66,138	69,219
Total	677,808	692,598	737,581	773,790	788,484	823,693

*Sources:**Milton Keynes Retail Capacity and Leisure Study 2018 (population to 2031)**ONS 2018 based population projections 2031 to 2043 (extrapolated to 2048)**Milton Keynes East: 800 homes by 2032; 1,100 by 2037 and 2,900 by 2048 (2.4 people per home)*

Table 2A: Food/beverage expenditure £ per person (2019 prices)

Zone	2019	2026	2032	2037	2048
Milton Keynes East development	1,358	1,330	1,403	1,468	1,620
Zone 1 - Bletchley	1,358	1,330	1,403	1,468	1,620
Zone 2 - Milton Keynes West	1,358	1,330	1,403	1,468	1,620
Zone 3 - Milton Keynes Central	1,358	1,330	1,403	1,468	1,620
Zone 4 - Milton Keynes South East	1,358	1,330	1,403	1,468	1,620
Zone 5 - Milton Keynes North East	1,358	1,330	1,403	1,468	1,620
Zone 6 - Milton Keynes North West	1,358	1,330	1,403	1,468	1,620
Zone 7 - Stony Stratford/Wolverton	1,358	1,330	1,403	1,468	1,620
Zone 8 - Buckingham/Brackley/Towcester	1,472	1,442	1,521	1,591	1,756
Zone 9 - Newport Pagnell	1,368	1,340	1,414	1,479	1,632
Zone 10 - Olney	1,358	1,330	1,403	1,468	1,620
Zone 11 - Ampthill/Flitwick/Cranfield	1,381	1,352	1,427	1,493	1,647
Zone 12 - Leighton Buzzard	1,381	1,352	1,427	1,493	1,647
Zone 13 - Aylesbury	1,514	1,483	1,565	1,636	1,806
Zone 14 - Bicester	1,444	1,414	1,492	1,561	1,722

Table 2B: Local catchment food/beverage expenditure £ per person (2019 prices)

Zone	2019	2026	2032	2037	2048
Milton Keynes East development	1,358	1,330	1,403	1,468	1,620
Zone 9 - Newport Pagnell	1,368	1,340	1,414	1,479	1,632

Sources: Experian expenditure and projections - Retail Planner Briefing Note 18 - October 2020

Table 3A: Total food and beverage expenditure (£m)

Zone	2019	2026	2032	2037	2048
Milton Keynes East development	0.00	0.00	2.69	3.87	11.27
Zone 1 - Bletchley	42.94	44.96	49.91	52.59	59.48
Zone 2 - Milton Keynes West	74.80	79.11	88.49	93.24	105.46
Zone 3 - Milton Keynes Central	41.50	43.81	48.89	51.51	58.27
Zone 4 - Milton Keynes South East	55.58	57.01	60.97	64.24	72.66
Zone 5 - Milton Keynes North East	40.51	42.46	47.17	49.70	56.22
Zone 6 - Milton Keynes North West	30.91	32.39	35.91	37.84	42.80
Zone 7 - Stony Stratford/Wolverton	38.82	40.70	45.13	47.55	53.79
Zone 8 - Buckingham/Brackley/Towcester	125.01	127.77	139.43	149.71	174.13
Zone 9 - Newport Pagnell	33.80	36.68	40.16	43.69	50.10
Zone 10 - Olney	13.36	13.97	15.49	16.32	18.46
Zone 11 - Ampthill/Flitwick/Cranfield	83.91	87.95	97.86	104.32	119.90
Zone 12 - Leighton Buzzard	129.81	135.92	151.01	160.98	185.02
Zone 13 - Aylesbury	180.55	188.37	208.62	224.04	260.24
Zone 14 - Bicester	86.28	88.43	96.68	103.22	119.22
Total	977.78	1,019.52	1,128.44	1,202.83	1,387.01

Source: Tables 1 and 2

Table 3B: Local catchment food/beverage expenditure (£m)

Zone	2019	2026	2032	2037	2048
Milton Keynes East development	0.00	0.00	2.69	3.87	11.27
Zone 9 - Newport Pagnell	33.80	36.68	40.16	43.69	50.10
Total	33.80	36.68	42.86	47.57	61.37

Source: Tables 1B and 2B

Table 4A: Lichfields' estimated retained food/beverage expenditure (% of total)

Zone	MKE	Zone 9	Inflow
Milton Keynes East development	50%	10%	10%

Table 4B: Retained food/beverage expenditure (£M)

By year	MKE	Zone 9	Inflow	Total
2026	0.00	3.67	0.41	4.08
2032	1.35	4.02	0.60	5.96
2037	1.94	4.37	0.70	7.01
2048	5.64	5.01	1.18	11.83

Source: Table 3A and 4A

Table 5: Food/beverage floorspace capacity (sq.m)

By year	Retained expenditure £M	Turnover density new floorspace £ per sq.m gross	Floorspace capacity sq.m gross
2026	4.08	5,000	815
2032	5.96	5,000	1,192
2037	7.01	5,000	1,401
2048	11.83	5,000	2,366

Sources: Table 4B

Table 6: Base year food and beverage market shares (%)

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Designated Centres															
Central Milton Keynes	30.0%	48.4%	64.0%	53.5%	53.9%	49.7%	76.8%	36.0%	22.5%	22.4%	12.5%	13.8%	21.1%	8.6%	3.0%
Kingston DC	10.0%	0.0%	1.3%	8.0%	17.3%	1.6%	0.0%	0.0%	0.0%	13.7%	16.6%	3.7%	1.9%	0.0%	0.0%
Westcroft DC	0.0%	0.9%	1.7%	0.8%	0.5%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bletchley DC	2.0%	39.6%	5.1%	2.6%	1.1%	7.4%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Wolverton DC	2.0%	0.0%	0.0%	0.8%	0.8%	4.6%	4.3%	12.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Newport Pagnell TC	30.0%	0.0%	0.0%	0.0%	0.0%	15.4%	0.0%	4.9%	0.0%	23.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Olney TC	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	63.0%	1.3%	0.0%	0.0%	0.0%
Stony Stratford TC	3.0%	1.6%	2.3%	1.2%	4.7%	0.8%	2.6%	26.9%	1.9%	5.7%	0.6%	0.0%	0.0%	0.8%	0.0%
Woburn Sands TC	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	7.4%	0.0%	0.0%
Local centres	5.0%	1.8%	14.4%	21.8%	9.7%	11.0%	6.2%	14.6%	0.5%	0.5%	1.6%	1.0%	0.0%	0.4%	0.4%
Out of centre	1.0%	3.6%	8.7%	0.7%	2.6%	2.0%	4.1%	1.2%	0.5%	0.0%	0.8%	1.7%	12.3%	1.2%	0.0%
MK Total	85.0%	95.8%	97.3%	89.4%	91.6%	92.9%	93.9%	95.9%	25.9%	70.9%	95.0%	22.1%	42.6%	11.7%	3.4%
Other outside MK	15.0%	4.2%	2.7%	10.7%	8.4%	7.1%	6.2%	4.1%	74.1%	29.2%	5.0%	77.9%	57.4%	88.3%	96.6%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Milton Keynes Retail Capacity and Leisure Study 2018 - NEMS household survey results for eating and drinking away from the home.

Table 7: Base year food and beverage turnover at 2019 (£M)

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2019	0.00	42.94	74.80	41.50	55.58	40.51	30.91	38.82	125.01	33.80	13.36	83.91	129.81	180.55	86.28	977.78
Designated Centres																
Central Milton Keynes	0.00	20.79	47.89	22.19	29.93	20.14	23.73	13.96	28.10	7.56	1.67	11.56	27.32	15.53	2.59	272.96
Kingston DC	0.00	0.00	0.94	3.30	9.59	0.64	0.00	0.00	0.00	4.61	2.21	3.08	2.43	0.00	0.00	26.80
Westcroft DC	0.00	0.37	1.23	0.34	0.28	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.43
Bletchley DC	0.00	17.00	3.80	1.09	0.63	2.98	0.00	0.00	0.00	0.84	0.00	0.00	0.00	0.00	0.00	26.34
Wolverton DC	0.00	0.00	0.00	0.34	0.42	1.85	1.34	4.80	0.66	0.00	0.00	0.00	0.00	1.35	0.00	10.76
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	6.25	0.00	1.91	0.00	7.88	0.00	0.00	0.00	0.00	0.00	16.03
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95	8.41	1.05	0.00	0.00	0.00	10.41
Stony Stratford TC	0.00	0.67	1.68	0.51	2.58	0.30	0.79	10.43	2.31	1.92	0.08	0.00	0.00	1.35	0.00	22.63
Woburn Sands TC	0.00	0.00	0.00	0.00	0.69	0.00	0.00	0.00	0.00	0.00	0.00	0.63	9.57	0.00	0.00	10.90
Local centres	0.00	0.75	10.73	9.03	5.39	4.44	1.90	5.67	0.66	0.18	0.22	0.82	0.00	0.77	0.32	40.87
Out of centre	0.00	1.55	6.51	0.28	1.42	0.82	1.25	0.47	0.66	0.00	0.11	1.38	15.97	2.17	0.00	32.57
MK Total	0.00	41.13	72.79	37.08	50.92	37.63	29.01	37.24	32.38	23.95	12.69	18.52	55.30	21.17	2.91	472.71
Other outside MK	0.00	1.81	2.02	4.42	4.65	2.88	1.90	1.58	92.63	9.85	0.66	65.39	74.51	159.38	83.37	505.07
TOTAL	0.00	42.94	74.80	41.50	55.58	40.51	30.91	38.82	125.01	33.80	13.36	83.91	129.81	180.55	86.28	977.78

Source: Table 3A and 6.

Table 8: Future food and beverage turnovers 2026 (£M) - without commitments

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2026	0.00	44.96	79.11	43.81	57.01	42.46	32.39	40.70	127.77	36.68	13.97	87.95	135.92	188.37	88.43	1019.52
Designated Centres																
Central Milton Keynes	0.00	21.77	50.65	23.43	30.70	21.11	24.87	14.63	28.72	8.21	1.74	12.11	28.61	16.20	2.65	285.40
Kingston DC	0.00	0.00	0.99	3.48	9.83	0.67	0.00	0.00	0.00	5.01	2.32	3.23	2.55	0.00	0.00	28.08
Westcroft DC	0.00	0.38	1.31	0.36	0.29	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.56
Bletchley DC	0.00	17.80	4.01	1.15	0.64	3.12	0.00	0.00	0.00	0.92	0.00	0.00	0.00	0.00	0.00	27.65
Wolverton DC	0.00	0.00	0.00	0.36	0.43	1.94	1.40	5.04	0.67	0.00	0.00	0.00	0.00	1.41	0.00	11.25
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	6.55	0.00	2.00	0.00	8.55	0.00	0.00	0.00	0.00	0.00	17.10
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.04	8.79	1.10	0.00	0.00	0.00	10.93
Stony Stratford TC	0.00	0.70	1.78	0.54	2.65	0.32	0.83	10.94	2.36	2.08	0.08	0.00	0.00	1.41	0.00	23.68
Woburn Sands TC	0.00	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.66	10.02	0.00	0.00	11.40
Local centres	0.00	0.79	11.35	9.53	5.53	4.65	1.99	5.94	0.67	0.19	0.23	0.86	0.00	0.80	0.33	42.86
Out of centre	0.00	1.62	6.88	0.30	1.45	0.86	1.31	0.49	0.67	0.00	0.12	1.45	16.72	2.26	0.00	34.13
MK Total	0.00	43.06	76.97	39.14	52.23	39.45	30.40	39.04	33.09	25.99	13.28	19.41	57.90	22.09	2.98	495.03
Other outside MK	0.00	1.90	2.14	4.67	4.77	3.01	1.99	1.66	94.68	10.69	0.70	68.53	78.02	166.29	85.44	524.49
TOTAL	0.00	44.96	79.11	43.81	57.01	42.46	32.39	40.70	127.77	36.68	13.97	87.95	135.92	188.37	88.43	1019.52

Source: Table 3A and 6.

Table 9A: Commitments - food and beverage turnover £M

	Floorspace Sq.M gross	Turnover density £ per sq.m gross	Expected turnover £M
CMK The Point	4,000	5,000	20.00
Midsummer Place	2,000	5,000	10.00
Lloyds Court, Silbury Boulevard	2,000	5,000	10.00
Tattenhoe Park new local centre	500	5,000	2.50
Western Expansion Area - High Street	800	5,000	4.00
Western Expansion Area - Local Centre	100	5,000	0.50
Total	9,400		47.00

Sources: MKBC planning application records.

Table 9B: Milton Keynes East - food and beverage turnover £M

	Floorspace Sq.M gross	Turnover density £ per sq.m gross	Expected turnover £M
Community Hub	1,000	5,000	5.00

Note - maximum floorspace parameter for community hub 1,000 sq.m gross.

Table 10A: Commitments - food and beverage turnover trade draw at 2026

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	0%	9%	15%	8%	11%	8%	6%	8%	7%	5%	3%	4%	11%	4%	1%	100%
Turnover £M	0.00	4.23	7.05	3.76	5.17	3.76	2.82	3.76	3.29	2.35	1.41	1.88	5.17	1.88	0.47	47.00

Source: Table 9A and Lichfields' estimates based on existing trip patterns

Table 10B: Milton Keynes East - food and beverage turnover trade draw at 2032

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
% trade draw	20%	0%	0%	0%	5%	5%	0%	0%	0%	60%	5%	5%	0%	0%	0%	100%
Turnover £M	1.00	0.00	0.00	0.00	0.25	0.25	0.00	0.00	0.00	3.00	0.25	0.25	0.00	0.00	0.00	5.00

Source: Lichfields' estimates based on existing trip patterns

Table 11: Future food and beverage turnovers 2026 (£M) - with commitments

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2026	0.00	44.96	79.11	43.81	57.01	42.46	32.39	40.70	127.77	36.68	13.97	87.95	135.92	188.37	88.43	1019.52
Commitments	0.00	4.23	7.05	3.76	5.17	3.76	2.82	3.76	3.29	2.35	1.41	1.88	5.17	1.88	0.47	47.00
Designated Centres																
Central Milton Keynes	0.00	19.01	45.15	20.81	27.08	18.62	22.42	12.64	27.51	7.35	1.43	11.66	26.81	15.90	2.63	259.01
Kingston DC	0.00	0.00	0.94	3.29	9.25	0.63	0.00	0.00	0.00	4.74	2.11	3.17	2.47	0.00	0.00	26.60
Westcroft DC	0.00	0.36	1.23	0.34	0.27	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.41
Bletchley DC	0.00	16.68	3.80	1.09	0.60	2.94	0.00	0.00	0.00	0.87	0.00	0.00	0.00	0.00	0.00	25.97
Wolverton DC	0.00	0.00	0.00	0.34	0.40	1.83	1.33	4.69	0.66	0.00	0.00	0.00	0.00	1.40	0.00	10.65
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	6.16	0.00	1.87	0.00	8.10	0.00	0.00	0.00	0.00	0.00	16.13
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.98	8.01	1.08	0.00	0.00	0.00	10.07
Stony Stratford TC	0.00	0.65	1.68	0.51	2.49	0.30	0.79	10.19	2.31	1.97	0.07	0.00	0.00	1.40	0.00	22.38
Woburn Sands TC	0.00	0.00	0.00	0.00	0.67	0.00	0.00	0.00	0.00	0.00	0.00	0.65	9.71	0.00	0.00	11.03
Local centres	0.00	0.74	10.74	9.00	5.20	4.37	1.89	5.54	0.66	0.18	0.21	0.84	0.00	0.79	0.33	40.49
Out of centre	0.00	1.52	6.51	0.28	1.37	0.81	1.25	0.46	0.66	0.00	0.10	1.42	16.19	2.24	0.00	32.80
MK Total	0.00	43.18	77.09	39.40	52.51	39.62	30.50	39.15	35.08	26.55	13.34	20.70	60.35	23.61	3.43	504.52
Other outside MK	0.00	1.78	2.02	4.40	4.49	2.84	1.89	1.55	92.69	10.13	0.63	67.25	75.57	164.76	85.00	515.00
TOTAL	0.00	44.96	79.11	43.81	57.01	42.46	32.39	40.70	127.77	36.68	13.97	87.95	135.92	188.37	88.43	1019.52

Source: Table 8 and 10A.

Table 12: Design year food and beverage turnovers 2032 (£M) - without Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2032	0.00	49.91	88.49	48.89	60.97	47.17	35.91	45.13	139.43	40.16	15.49	97.86	151.01	208.62	96.68	1125.74
Commitments	0.00	4.70	7.89	4.20	5.53	4.18	3.13	4.17	3.59	2.57	1.56	2.09	5.74	2.08	0.51	51.94
Designated Centres																
Central Milton Keynes	0.00	21.10	50.50	23.22	28.96	20.68	24.86	14.02	30.02	8.05	1.59	12.97	29.79	17.61	2.87	286.24
Kingston DC	0.00	0.00	1.05	3.67	9.90	0.70	0.00	0.00	0.00	5.19	2.34	3.53	2.74	0.00	0.00	29.12
Westcroft DC	0.00	0.40	1.38	0.38	0.29	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.68
Bletchley DC	0.00	18.51	4.25	1.21	0.65	3.26	0.00	0.00	0.00	0.95	0.00	0.00	0.00	0.00	0.00	28.83
Wolverton DC	0.00	0.00	0.00	0.38	0.43	2.03	1.48	5.21	0.72	0.00	0.00	0.00	0.00	1.55	0.00	11.79
Newport Pagnell TC	0.00	0.00	0.00	0.00	0.00	6.85	0.00	2.07	0.00	8.87	0.00	0.00	0.00	0.00	0.00	17.79
Olney TC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.08	8.88	1.20	0.00	0.00	0.00	11.15
Stony Stratford TC	0.00	0.72	1.88	0.57	2.67	0.33	0.87	11.31	2.53	2.16	0.08	0.00	0.00	1.55	0.00	24.67
Woburn Sands TC	0.00	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.72	10.79	0.00	0.00	12.22
Local centres	0.00	0.82	12.01	10.04	5.57	4.86	2.10	6.14	0.72	0.20	0.23	0.94	0.00	0.88	0.36	44.85
Out of centre	0.00	1.68	7.28	0.31	1.46	0.90	1.38	0.50	0.72	0.00	0.12	1.58	17.99	2.48	0.00	36.41
MK Total	0.00	47.94	86.23	43.98	56.17	44.02	33.81	43.42	38.28	29.07	14.79	23.04	67.05	26.15	3.75	557.70
Other outside MK	0.00	1.98	2.26	4.92	4.81	3.15	2.10	1.71	101.15	11.09	0.70	74.82	83.96	182.46	92.94	568.05
TOTAL	0.00	49.91	88.49	48.89	60.97	47.17	35.91	45.13	139.43	40.16	15.49	97.86	151.01	208.62	96.68	1125.74

Source: Table 3A and 11.

Table 13: Design year food and beverage turnovers 2032 (£M) - with Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2032	2.69	49.91	88.49	48.89	60.97	47.17	35.91	45.13	139.43	40.16	15.49	97.86	151.01	208.62	96.68	1128.44
Milton Keynes East	1.00	0.00	0.00	0.00	0.25	0.25	0.00	0.00	0.00	3.00	0.25	0.25	0.00	0.00	0.00	5.00
Commitments	0.00	4.70	7.89	4.20	5.51	4.16	3.13	4.17	3.59	2.38	1.54	2.09	5.74	2.08	0.51	51.67
Designated Centres																
Central Milton Keynes	0.51	21.10	50.50	23.22	28.84	20.57	24.86	14.02	30.02	7.44	1.56	12.94	29.79	17.61	2.87	285.86
Kingston DC	0.17	0.00	1.05	3.67	9.86	0.70	0.00	0.00	0.00	4.81	2.30	3.52	2.74	0.00	0.00	28.81
Westcroft DC	0.00	0.40	1.38	0.38	0.29	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.68
Bletchley DC	0.03	18.51	4.25	1.21	0.64	3.24	0.00	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.00	28.77
Wolverton DC	0.03	0.00	0.00	0.38	0.43	2.02	1.48	5.21	0.72	0.00	0.00	0.00	0.00	1.55	0.00	11.81
Newport Pagnell TC	0.51	0.00	0.00	0.00	0.00	6.81	0.00	2.07	0.00	8.21	0.00	0.00	0.00	0.00	0.00	17.60
Olney TC	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99	8.73	1.20	0.00	0.00	0.00	10.96
Stony Stratford TC	0.05	0.72	1.88	0.57	2.66	0.33	0.87	11.31	2.53	2.00	0.08	0.00	0.00	1.55	0.00	24.54
Woburn Sands TC	0.00	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.72	10.79	0.00	0.00	12.22
Local centres	0.08	0.82	12.01	10.04	5.54	4.83	2.10	6.14	0.72	0.18	0.23	0.93	0.00	0.88	0.36	44.87
Out of centre	0.02	1.68	7.28	0.31	1.46	0.89	1.38	0.50	0.72	0.00	0.11	1.58	17.99	2.48	0.00	36.41
MK Total	2.44	47.94	86.23	43.98	56.19	44.04	33.81	43.42	38.28	29.90	14.80	23.23	67.05	26.15	3.75	561.20
Other outside MK	0.25	1.98	2.26	4.92	4.79	3.13	2.10	1.71	101.15	10.27	0.69	74.63	83.96	182.46	92.94	567.23
TOTAL	2.69	49.91	88.49	48.89	60.97	47.17	35.91	45.13	139.43	40.16	15.49	97.86	151.01	208.62	96.68	1128.44

Source: Table 10B and 12.

Table 14: Horison year food and beverage turnovers 2037 (£M) - with Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2037	3.87	52.59	93.24	51.51	64.24	49.70	37.84	47.55	149.71	43.69	16.32	104.32	160.98	224.04	103.22	1202.83
Milton Keynes East	1.44	0.00	0.00	0.00	0.26	0.26	0.00	0.00	0.00	3.26	0.26	0.27	0.00	0.00	0.00	5.76
Commitments	0.00	4.95	8.31	4.42	5.80	4.38	3.29	4.39	3.85	2.59	1.62	2.22	6.12	2.24	0.55	54.74
Designated Centres																
Central Milton Keynes	0.73	22.24	53.21	24.47	30.39	21.68	26.19	14.77	32.23	8.10	1.64	13.79	31.76	18.91	3.06	303.17
Kingston DC	0.24	0.00	1.10	3.87	10.39	0.73	0.00	0.00	0.00	5.23	2.42	3.75	2.92	0.00	0.00	30.66
Westcroft DC	0.00	0.42	1.45	0.40	0.30	0.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.82
Bletchley DC	0.05	19.50	4.47	1.28	0.68	3.42	0.00	0.00	0.00	0.96	0.00	0.00	0.00	0.00	0.00	30.36
Wolverton DC	0.05	0.00	0.00	0.40	0.45	2.13	1.56	5.48	0.77	0.00	0.00	0.00	0.00	1.66	0.00	12.50
Newport Pagnell TC	0.73	0.00	0.00	0.00	0.00	7.17	0.00	2.18	0.00	8.93	0.00	0.00	0.00	0.00	0.00	19.02
Olney TC	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.08	9.20	1.28	0.00	0.00	0.00	11.61
Stony Stratford TC	0.07	0.76	1.98	0.60	2.80	0.35	0.92	11.91	2.71	2.17	0.08	0.00	0.00	1.66	0.00	26.03
Woburn Sands TC	0.00	0.00	0.00	0.00	0.75	0.00	0.00	0.00	0.00	0.00	0.00	0.77	11.50	0.00	0.00	13.02
Local centres	0.12	0.86	12.65	10.58	5.84	5.09	2.21	6.47	0.77	0.20	0.24	1.00	0.00	0.94	0.39	47.36
Out of centre	0.02	1.77	7.67	0.33	1.54	0.94	1.46	0.53	0.77	0.00	0.12	1.68	19.18	2.66	0.00	38.68
MK Total	3.51	50.51	90.86	46.33	59.20	46.40	35.63	45.75	41.11	32.52	15.60	24.76	71.48	28.09	4.00	595.73
Other outside MK	0.37	2.08	2.38	5.18	5.04	3.30	2.21	1.81	108.60	11.17	0.73	79.56	89.50	195.95	99.22	607.10
TOTAL	3.87	52.59	93.24	51.51	64.24	49.70	37.84	47.55	149.71	43.69	16.32	104.32	160.98	224.04	103.22	1202.83

Source: Table 3A and 13.

Table 15: Horison year food and beverage turnovers 2048 (£M) - with Milton Keynes East

Zone	MKE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Expenditure 2048	11.27	59.48	105.46	58.27	72.66	56.22	42.80	53.79	174.13	50.10	18.46	119.90	185.02	260.24	119.22	1387.01
Milton Keynes East	4.18	0.00	0.00	0.00	0.30	0.30	0.00	0.00	0.00	3.74	0.30	0.31	0.00	0.00	0.00	9.13
Commitments	0.00	5.60	9.40	5.00	6.56	4.95	3.73	4.97	4.48	2.97	1.83	2.56	7.04	2.60	0.63	62.32
Designated Centres																
Central Milton Keynes	2.13	25.15	60.19	27.67	34.37	24.52	29.62	16.71	37.49	9.29	1.86	15.85	36.50	21.97	3.54	346.86
Kingston DC	0.71	0.00	1.25	4.37	11.75	0.83	0.00	0.00	0.00	6.00	2.74	4.31	3.36	0.00	0.00	35.31
Westcroft DC	0.00	0.47	1.65	0.45	0.34	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.19
Bletchley DC	0.14	22.06	5.06	1.44	0.77	3.87	0.00	0.00	0.00	1.10	0.00	0.00	0.00	0.00	0.00	34.44
Wolverton DC	0.14	0.00	0.00	0.45	0.51	2.41	1.76	6.20	0.89	0.00	0.00	0.00	0.00	1.93	0.00	14.31
Newport Pagnell TC	2.13	0.00	0.00	0.00	0.00	8.12	0.00	2.47	0.00	10.24	0.00	0.00	0.00	0.00	0.00	22.95
Olney TC	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.24	10.41	1.47	0.00	0.00	0.00	13.26
Stony Stratford TC	0.21	0.86	2.24	0.67	3.17	0.39	1.04	13.47	3.15	2.49	0.10	0.00	0.00	1.93	0.00	29.74
Woburn Sands TC	0.00	0.00	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.88	13.22	0.00	0.00	14.95
Local centres	0.35	0.97	14.31	11.96	6.61	5.76	2.50	7.32	0.89	0.23	0.27	1.14	0.00	1.10	0.44	53.87
Out of centre	0.07	2.01	8.68	0.37	1.74	1.07	1.65	0.60	0.89	0.00	0.14	1.94	22.04	3.09	0.00	44.28
MK Total	10.21	57.13	102.77	52.41	66.96	52.48	40.30	51.75	47.81	37.29	17.64	28.46	82.15	32.62	4.62	684.60
Other outside MK	1.06	2.35	2.69	5.86	5.70	3.74	2.50	2.04	126.31	12.81	0.82	91.44	102.86	227.61	114.60	702.41
TOTAL	11.27	59.48	105.46	58.27	72.66	56.22	42.80	53.79	174.13	50.10	18.46	119.90	185.02	260.24	119.22	1387.01

Source: Table 3A and 14.

Table 16: Commitments food and beverage impact summary 2026

	Base year 2019 £M	Design year 2026 turnover no commitments £M	Design year 2026 turnover with commitment £M	% Impact	Base year v Design year % increase
Commitments	n/a	n/a	47.00	n/a	n/a
<i>Designated Centres</i>					
Central Milton Keynes	272.96	285.40	259.01	-9.2%	-5.1%
Kingston DC	26.80	28.08	26.60	-5.3%	-0.8%
Westcroft DC	2.43	2.56	2.41	-5.7%	-0.9%
Bletchley DC	26.34	27.65	25.97	-6.1%	-1.4%
Wolverton DC	10.76	11.25	10.65	-5.3%	-1.0%
Newport Pagnell TC	16.03	17.10	16.13	-5.7%	0.6%
Olney TC	10.41	10.93	10.07	-7.9%	-3.3%
Stony Stratford TC	22.63	23.68	22.38	-5.5%	-1.1%
Woburn Sands TC	10.90	11.40	11.03	-3.2%	1.2%
Local centres	40.87	42.86	40.49	-5.5%	-0.9%
Out of centre	32.57	34.13	32.80	-3.9%	0.7%
MK Total	472.71	495.03	504.52	-7.6%	-3.2%
Other outside MK	505.07	524.49	515.00	-1.8%	2.0%
Total	977.78	1,019.52	1,019.52		

Source: Tables 7 to 12

Table 17: Milton Keynes East food and beverage impact summary 2032

	Base year 2019 £M	Design year 2032 turnover without MKE £M	Design year 2032 turnover with MKE £M	% Impact	Base year v Design year % increase
MK East	n/a	n/a	5.00	n/a	n/a
Commitments	n/a	51.94	51.67	-0.5%	n/a
Designated Centres					
Central Milton Keynes	272.96	286.24	285.86	-0.1%	4.7%
Kingston DC	26.80	29.12	28.81	-1.1%	7.5%
Westcroft DC	2.43	2.68	2.68	-0.1%	10.0%
Bletchley DC	26.34	28.83	28.77	-0.2%	9.2%
Wolverton DC	10.76	11.79	11.81	0.2%	9.7%
Newport Pagnell TC	16.03	17.79	17.60	-1.1%	9.7%
Olney TC	10.41	11.15	10.96	-1.7%	5.3%
Stony Stratford TC	22.63	24.67	24.54	-0.5%	8.5%
Woburn Sands TC	10.90	12.22	12.22	0.0%	12.1%
Local centres	40.87	44.85	44.87	0.0%	9.8%
Out of centre	32.57	36.41	36.41	0.0%	11.8%
MK Total	472.71	557.70	561.20	-0.3%	6.7%
Other outside MK	505.07	568.05	567.23	-0.1%	12.3%
Total	977.78	1,125.74	1,128.44		

Source: Tables 7 to 13

Table 18: Milton Keynes East horizon food and beverage turnover at 2037 and 2048

	Base year 2019 £M	Design year 2037 turnover with MKE £M	Design year 2043 turnover with MKE £M	Base v 2037 % increase	Base v 2048 % increase
MK East	n/a	5.76	9.13	n/a	n/a
Commitments	n/a	54.74	62.32	n/a	n/a
Designated Centres					
Central Milton Keynes	272.96	303.17	346.86	11.1%	27.1%
Kingston DC	26.80	30.66	35.31	14.4%	31.7%
Westcroft DC	2.43	2.82	3.19	15.9%	31.1%
Bletchley DC	26.34	30.36	34.44	15.3%	30.8%
Wolverton DC	10.76	12.50	14.31	16.2%	32.9%
Newport Pagnell TC	16.03	19.02	22.95	18.6%	43.1%
Olney TC	10.41	11.61	13.26	11.5%	27.4%
Stony Stratford TC	22.63	26.03	29.74	15.0%	31.4%
Woburn Sands TC	10.90	13.02	14.95	19.5%	37.2%
Local centres	40.87	47.36	53.87	15.9%	31.8%
Out of centre	32.57	38.68	44.28	18.7%	35.9%
MK Total	472.71	595.73	684.60	13.2%	29.7%
Other outside MK	505.07	607.10	702.41	20.2%	39.1%
Total	977.78	1,202.83	1,387.01		

Source: Tables 7 to 14

