**South Oxfordshire Retail and Leisure Needs Assessment 2015**
**South Oxfordshire District Council**
**Summary of Initial Findings**
**February 2015**

## Background

1.1 GVA has been instructed by South Oxfordshire District Council (SODC) to undertake an assessment of retail and other town centre uses within the district's four main centres (Didcot, Henley-on-Thames, Thame and Wallingford) and forecast the need for new retail floorspace in the district up to 2031.

1.2 The study will update the last retail and leisure needs assessment and provide an evidence base and reasoned justification for the emerging South Oxfordshire Local Plan 2031, the Science Vale Area Action Plan DPD and neighbourhood plans.

1.3 Our terms of reference are to:

- Review and advise on the performance of the four main centres of Didcot, Henley-on-Thames, Thame and Wallingford, identifying any potential deficiencies or 'gaps' in existing provision or underserved markets; and
- Identify the capacity for new retail provision across the four main centres up to 2031 in accordance with the provisions of the NPPF and in light of potential increases in population and forecast changes in retail expenditure.
- Provide recommendations on strategy, policy and land allocations for retail, leisure and other town centre uses.

1.4 In addition to on-site and desk based evidence gathering, this report is informed by a new and up-to-date Household Telephone Survey across twelve survey zones; by in-centre visitor surveys undertaken in the four main centres; and by a Business Telephone Survey of businesses located in the four main centres.

1.5 Attached to this paper are a series of Plans illustrating the identified 'market shares' of each centre throughout the survey area, for both food and non-food shopping. The final report will illustrate full catchment areas of each town centre for non-food shopping. Henley-on-Thames in particular has a strong catchment from further afield (43% from outside the core survey area).

## Retail Market Review and Trends

1.6 The 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.

1.7 Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers.

1.8 Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.

1.9 It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust 'place marketing' strategies put in place.

### Didcot Town Centre - Headlines

1.10 Didcot town centre appears to be performing reasonably well. Almost 50% of the retail outlets in the town centre are operated by national multiple retailers. The offer is generally pitched towards the middle / lower-end of the market, with an absence of higher quality retail outlets.

1.11 The offer in the town centre is anchored by the large Sainsbury's store in the Orchard Centre. The location of this store adjacent to the rest of the town centre retail offer, but also served by a large car park, means it is able to cater for both bulk and top-up shopping trips. The visitor survey results confirm that food shopping is the main reason for visitors' trips to the town centre.

1.12 The centre has an important cultural / leisure function, with an arts centre and cinema both forming part of the town centre offer. There is a shortage of family dining-type restaurants to support this cultural offer, however, and few respondents to our household survey identified that they currently visit the centre for dining.

1.13 The vacancy rate in the town centre is below the UK average, and has decreased since the most recent Experian Goad survey of the centre in November 2013 – although the majority of the subsequent lettings have been to fairly poor quality retailers.

1.14 The environmental quality of the centre is generally good, although the eastern end of Broadway would benefit from further investment. The centre is also readily accessible and has a good level of parking provision.

1.15 Both visitors and local businesses consider that the town centre would be enhanced through a better range of shops. The proposals for the Phase II extension to the Orchard Centre should assist in further diversifying the retail offer in the town centre, including meeting the qualitative gap in the shortfall of restaurant provision.

### Henley-on-Thames Town Centre - Headlines

1.16 The diversity of uses and quality of the retail offer in the town centre is strong. A range of national and independent convenience goods retailers co-exist successfully. The Waitrose store anchors both the convenience goods and wider town centre offer.

1.17 The comparison goods offer is generally high-end, with a number of upscale national and independent retailers trading in the centre, including speciality clothing boutiques. For the most part, there is also sufficient range of retailer representation that more everyday shopping needs can also be met.

1.18 The commercial leisure offer in the centre is also strong, and makes full effect of the compact and historic town centre. The results of the visitor survey confirm that Henley also performs an important evening economy role.

1.19 Examples of key retailer and leisure operators trading in the centre include Waitrose, Sainsbury's Local, Boots, Fat Face, Joules, White Stuff, Clarks, Starbucks, Cargo, Crew Clothing and Pizza Express.

1.20 The vacancy rate is below the UK average, and since the most recent Experian survey of the centre it is apparent that the number of vacant units within the centre has fallen further.

1.21 The town centre is a well-maintained historic centre, with much of the centre forming part of a Conservation Area, with a large number of listed buildings in the centre. Buildings are well-maintained and the utilisation of similar colour palettes further enhances the centre. Both the Market Place and Thameside are particularly positive assets. Overall, the environmental quality of the centre makes a significant contribution to the wider vitality and viability of the centre.

1.22 The strong environmental quality of the centre was identified as important reason for visiting the centre in the visitors survey, and it is noteworthy that almost half of visitors surveyed were from outside the South Oxfordshire area. The centre therefore also has an important tourism role, which adds footfall to the centre and contributes significantly to its vitality and viability.

1.23 The centre benefits from good accessibility by public transport and private car – although a shortage of car parking was identified as an area of concern in both the visitors' surveys. The survey of businesses in the town centre identified no major issues of concern.

### Thame Town Centre – Headlines

1.24 Thame town centre has an important convenience goods function, with a large Waitrose supermarket forming the anchor to the town centre offer, and we would expect this store plays an important role in supporting the wider vitality and viability of the town centre.

1.25 The comparison goods offer is a mixture of mainstream retailers (e.g. Boots, Robert Dyas) and more specialist independent retailers and contributes to a diverse retail offer. There may be scope for strengthening of the café / commercial leisure offer in the centre to help expand the offer of the town centre beyond retail trading hours.

1.26 The vacancy rate is significantly below the UK average and a number of previously-vacant units have been taken up by a mixture of national and independent operators in recent months.

1.27 Thame is a picturesque town centre and the environmental quality is strong throughout. The centre is within a Conservation Area and there are a significant number of listed buildings. Public realm is of a good quality, and enhances the overall appearance of the centre. 98% of businesses surveyed said they were satisfied with the physical appearance of the town centre.

1.28 The centre is accessible by car and bus services. Whilst visitors to the centre identified parking as an area of concern, most businesses surveyed in the centre were satisfied with the adequacy of parking provision. Car parks were observed to be well supported at the time of our visit to the centre.

### Wallingford Town Centre – Headlines

1.29 In common with the other South Oxfordshire centres, Wallingford exhibits generally positive signs of vitality and viability.

1.30 As with Thame, the convenience goods function of the centre is particularly important to the overall 'health' of the centre and the relocated Waitrose store can be considered the 'anchor' to the retail offer.

1.31 The comparison goods retail offer is a mixture of day-to-day goods and services, interspersed with a more specialist retail offer, largely provided by the independent retail sector. Overall the retail offer of the centre errs towards the more functional rather than higher-end side.

1.32 Only a quarter of retail units in the town centre are operated by national retailers, likely a reflection of the centre's relatively close proximity to Didcot. The independent sector therefore accounts for the majority of the retail offer in the centre.

1.33 The vacancy rate in the town centre is below the UK average but higher than other centres in the District. The former Waitrose store remains vacant, and the attraction of a quality replacement store for this unit to help drive footfall in the southern part of the town centre is important, particularly as there are a number of other smaller vacant units in this part of the centre.

1.34 There may be scope for an improved range of evening economy uses, particularly restaurants, within the centre.

1.35 The environmental quality of the centre, in common with the other smaller centres in the District, makes a positive contribution to the overall vitality and viability of the centre.

### Looking Ahead

1.36 The Study has identified that retail across the district is performing well in qualitative and quantitative terms, both for food and non-food. There is scope for some further retail and leisure floorspace to cater for future increases in population and forecast changes in retail expenditure.

1.37 In terms of comparison goods floorspace, Didcot has been identified as the preferred and most suitable centre within the district to meet the need for new floorspace, consistent with proposals for the Orchard Centre Phase II.

1.38 Convenience goods floorspace is performing well in Thame and Henley-on-Thames, and the Study has identified the potential need for smaller format foodstores to supplement the existing offer.

1.39 The Waitrose in Wallingford is performing particularly well. However, planning permission has been granted for a new Morrisons foodstore on the Hithercroft Industrial Estate, outside Wallingford town centre, and we do not consider there to be a further need over and above this scheme. A priority in Wallingford town centre is to re-let the former Waitrose foodstore which has been vacant for over 5 years.

1.40 The final report will provide detailed recommendations on strategy, policy and land allocations for retail, leisure and town centre uses.

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# Plans

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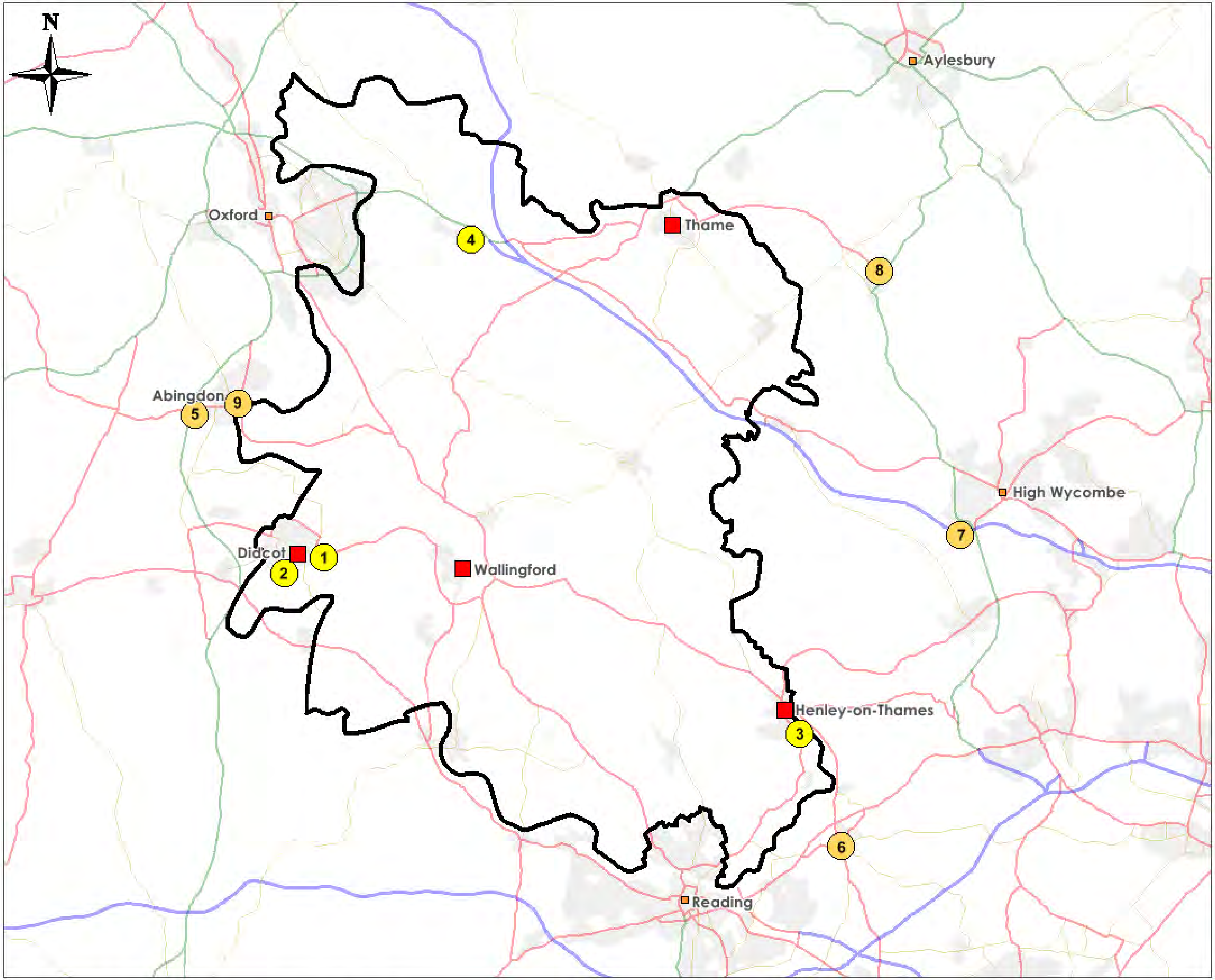
# Plan 1 Town Centres and Foodstores

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## Centres & Foodstores Location Plan

Key

South Oxfordshire boundary

Town Centre Foodstores

DIDCOT
- Sainsbury's Superstore, Central Drive

HENLEY-ON-THAMES
- Waitrose, Bell Street
- Sainsburys Local, Bell Street

THAME
- Waitrose, Greyhound Lane
- Co-op, High Street
- Sainsburys, High Street

WALLINGFORD
- Waitrose, St Martin's Street

Out of Centre Foodstore

1 Tesco, Wallingford Rd, North Moreton
2 Tesco Express, Cockroft Rd
3 Tesco Superstore, Reading Rd
4 Asda Superstore, London Rd, Wheatley

Key Competing Foodstores Outside District

5 Tesco Extra, Marcham Rd, Abingdon
6 Waitrose, London Rd, Twyford
7 Asda, Holmers Farm Way, High Wycombe
8 Tesco, Longwick Rd, Princes Risborough
9 Waitrose, Abbey Close, Abingdon



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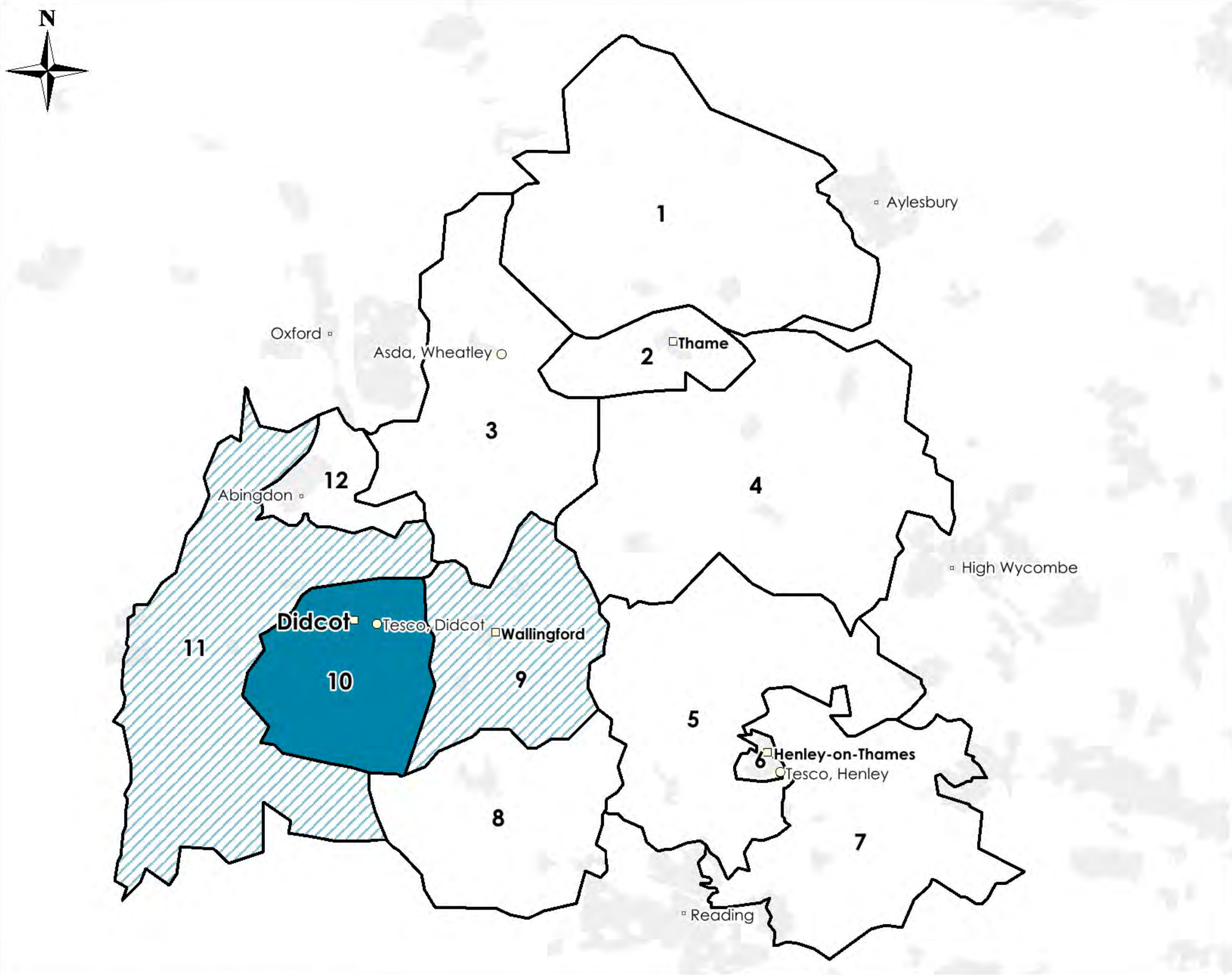
# Plan 2 Didcot Town Centre Convenience Goods Market Shares

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## Plan 2. Didcot Town Centre Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+



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# Plan 3 Henley Town Centre Convenience Goods Market Shares


## Plan 3. Henley-on-Thames Town Centre Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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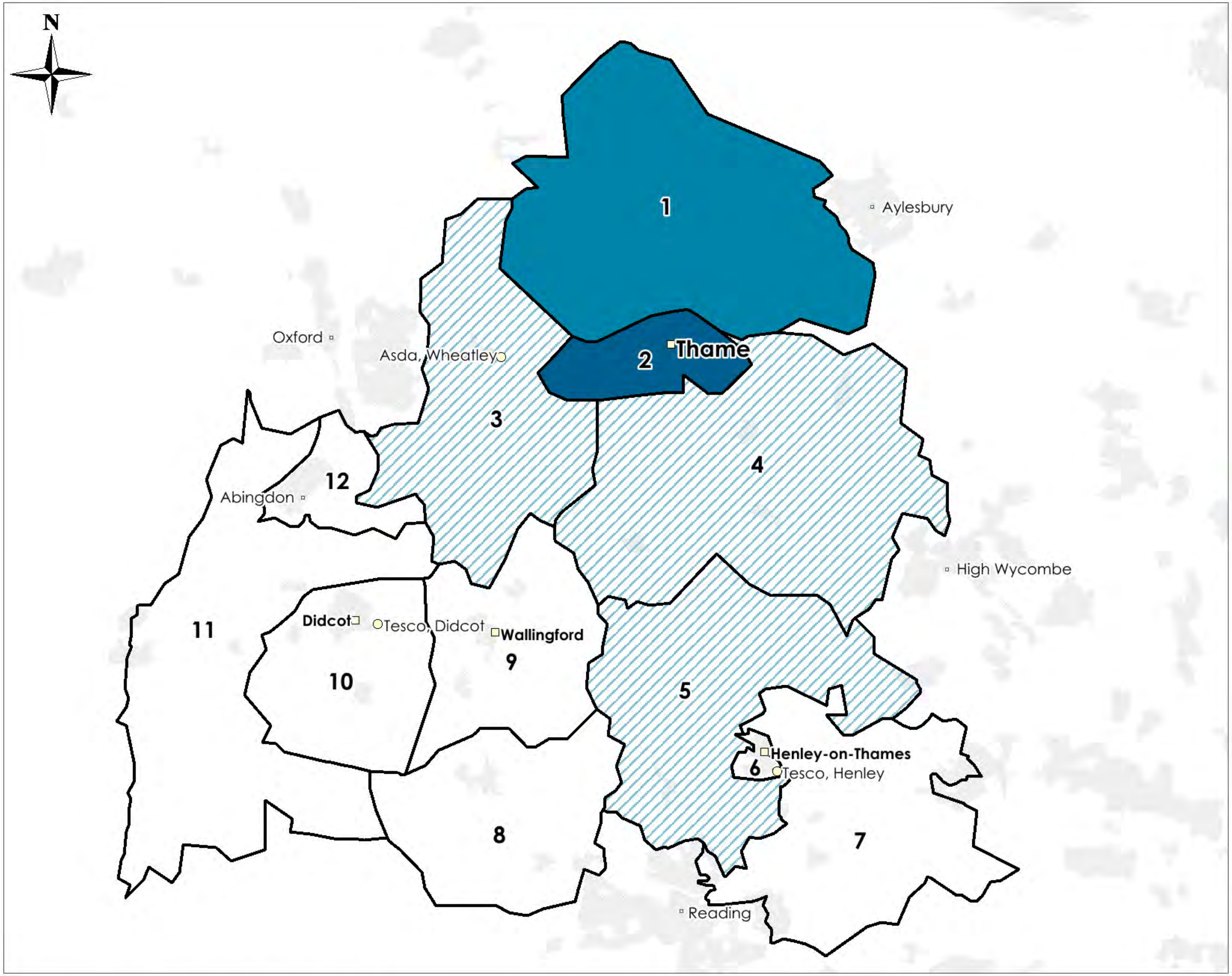
# Plan 4 Thame Town Centre Convenience Goods Market Shares




**Plan 4. Thame Town Centre Convenience Goods Market Share**

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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# Plan 5 Wallingford Town Centre Convenience Goods Market Shares


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## Plan 5. Wallingford Town Centre Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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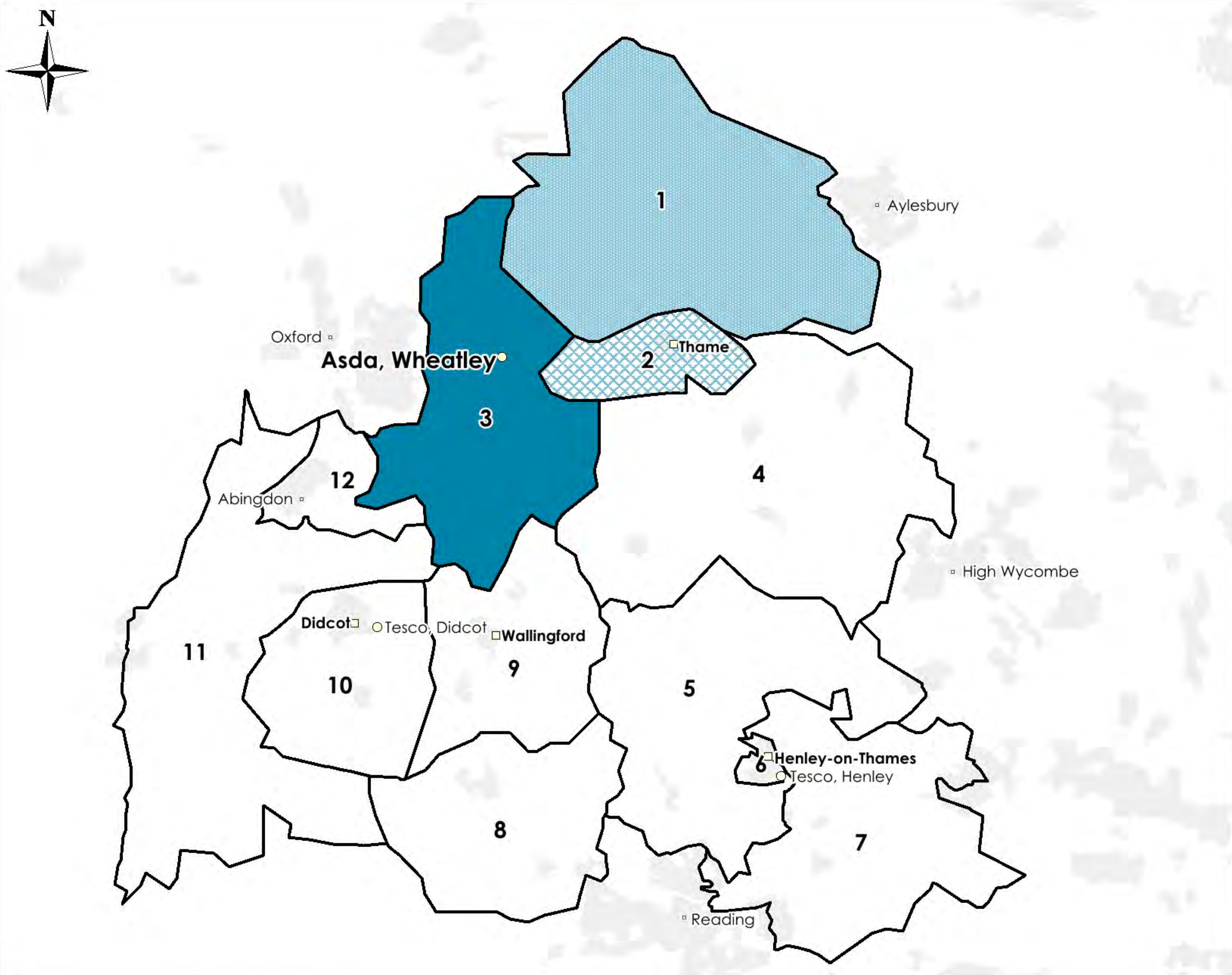
# Plan 6 Asda, Wheatley Convenience Goods Market Share




**Plan 6. Asda, Wheatley Convenience Goods Market Share**

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+



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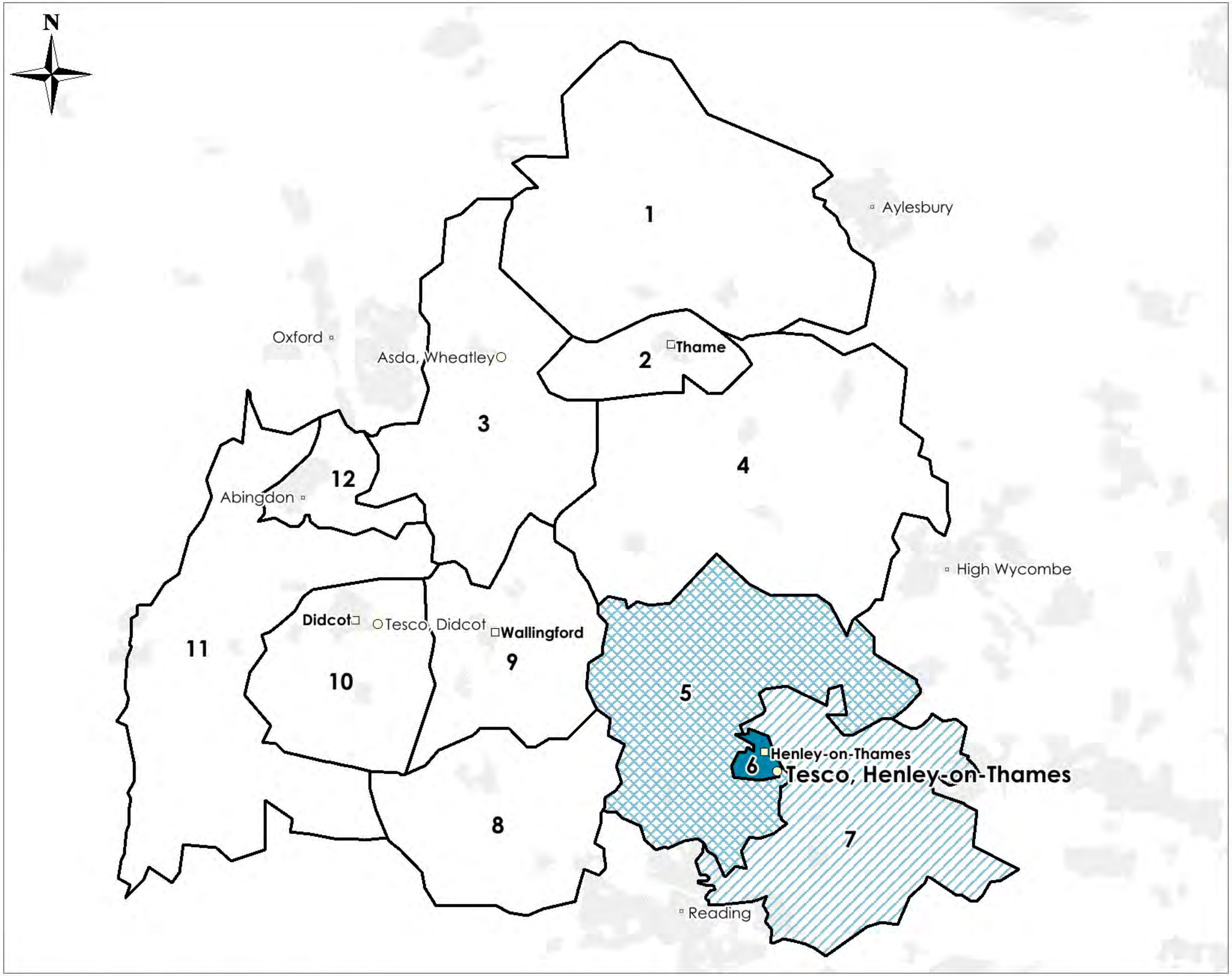
# Plan 7

# Tesco, Henley-on-Thames, Convenience Goods Market Share

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## Plan 7. Tesco, Henley-on-Thames Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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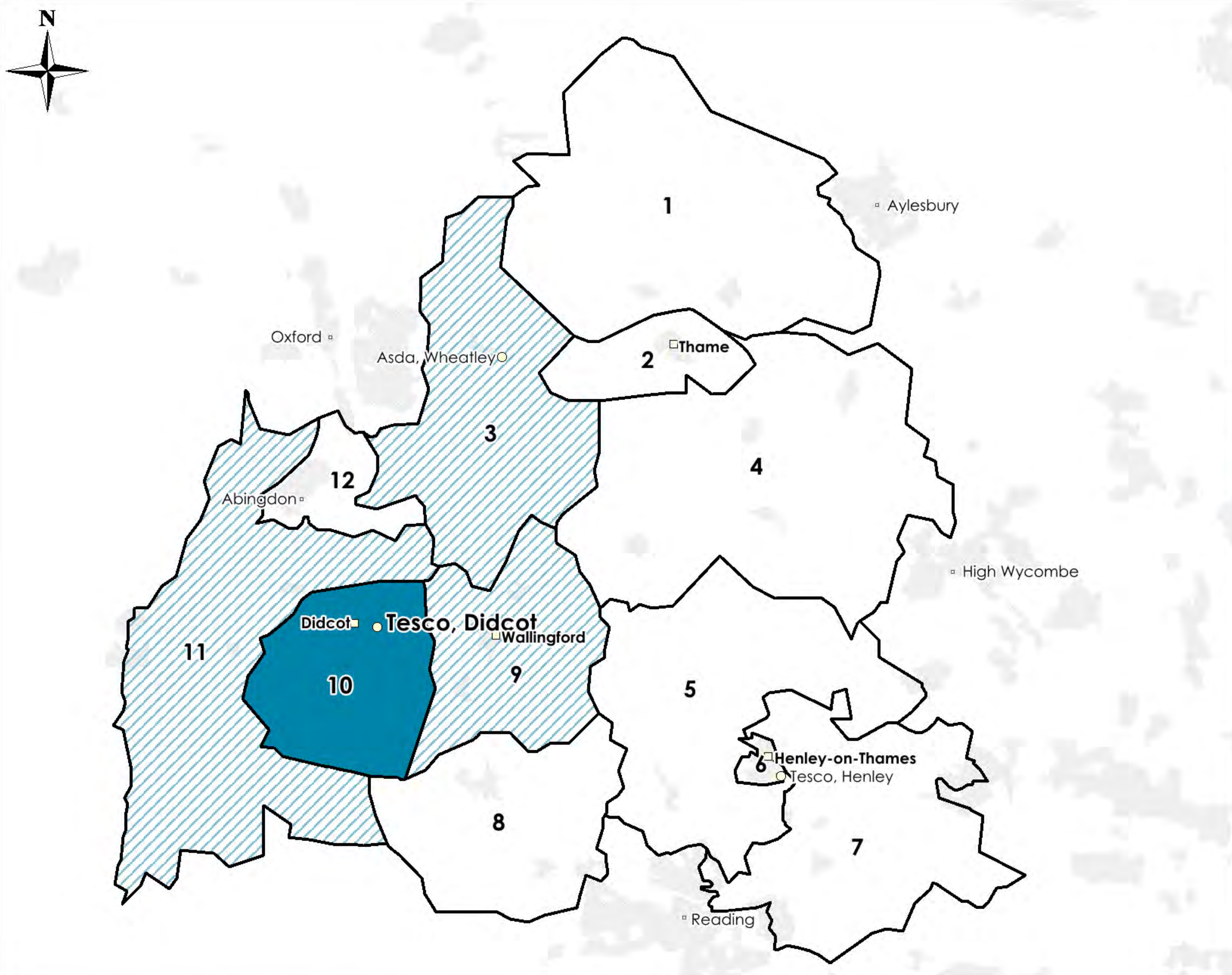
# Plan 8 Tesco, Didcot, Convenience Goods Market Share

## Plan 8. Tesco, Didcot Convenience Goods Market Share




Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+





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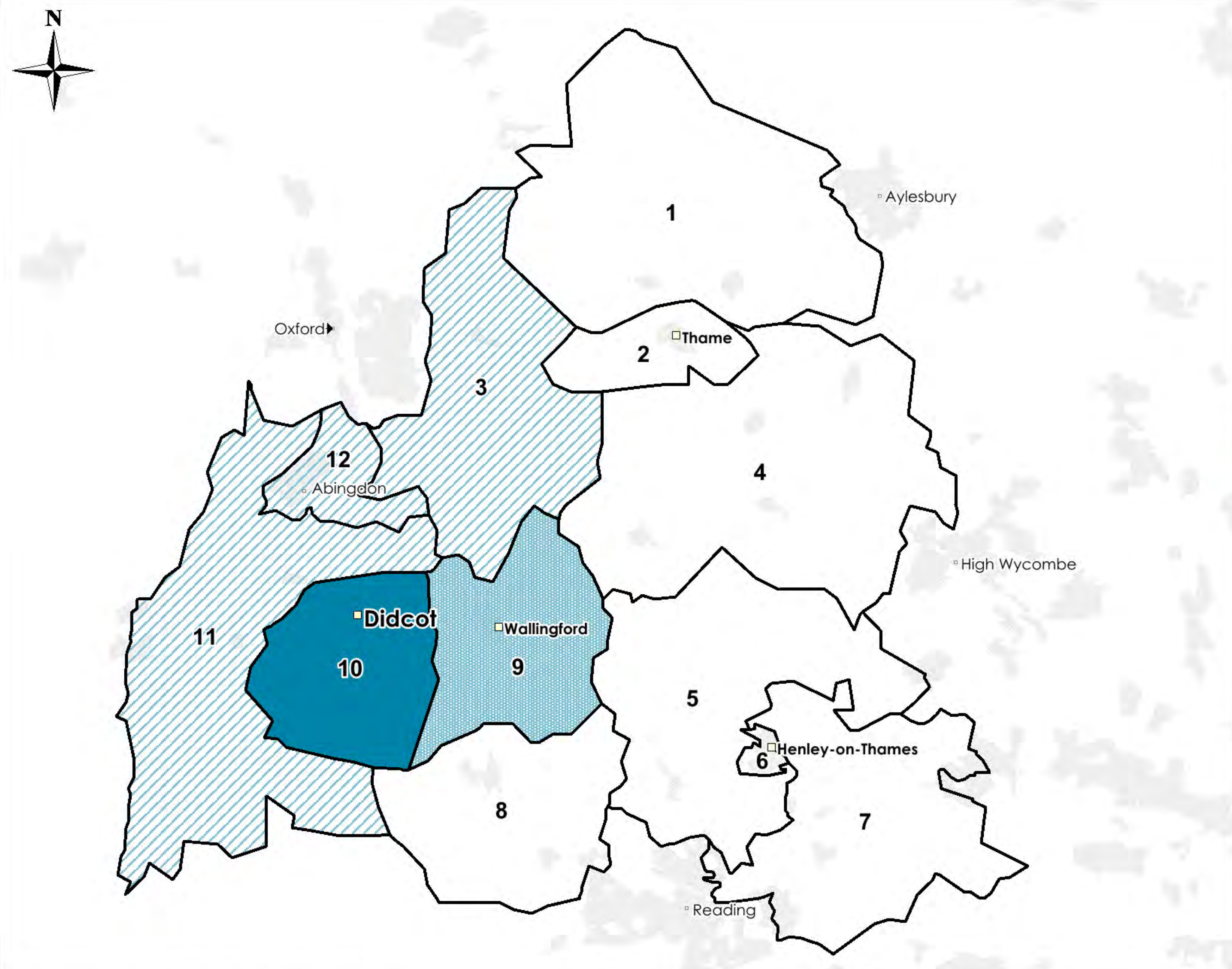
# Plan 9 Didcot Town Centre Comparison Goods Market Share

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## Plan 9. Didcot Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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# Plan 10 Henley-on-Thames Town Centre Comparison Goods Market Share


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## Plan 10. Henley-on-Thames Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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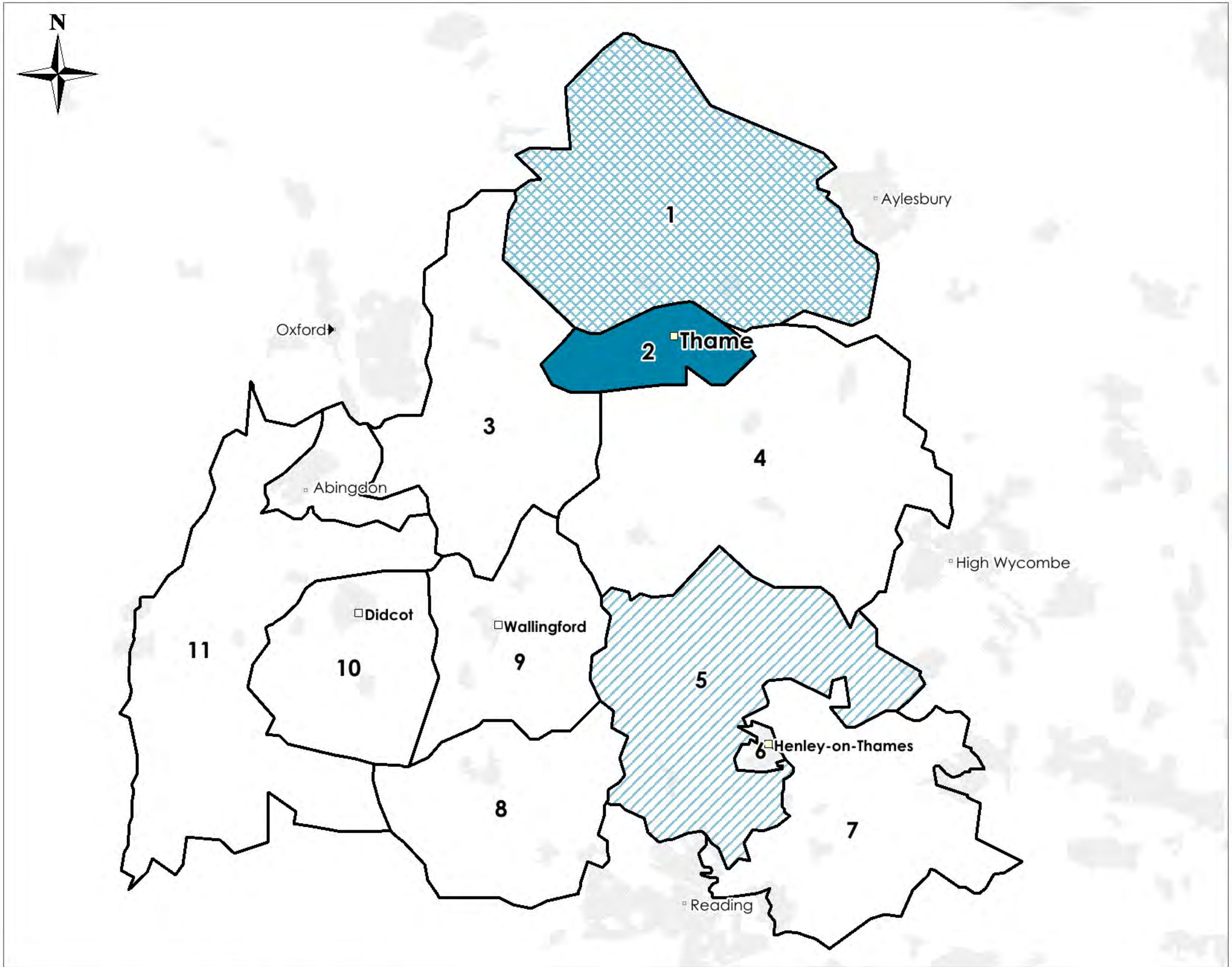
# Plan 11 Thame Town Centre Comparison Goods Market Share

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## Plan 11. Thame Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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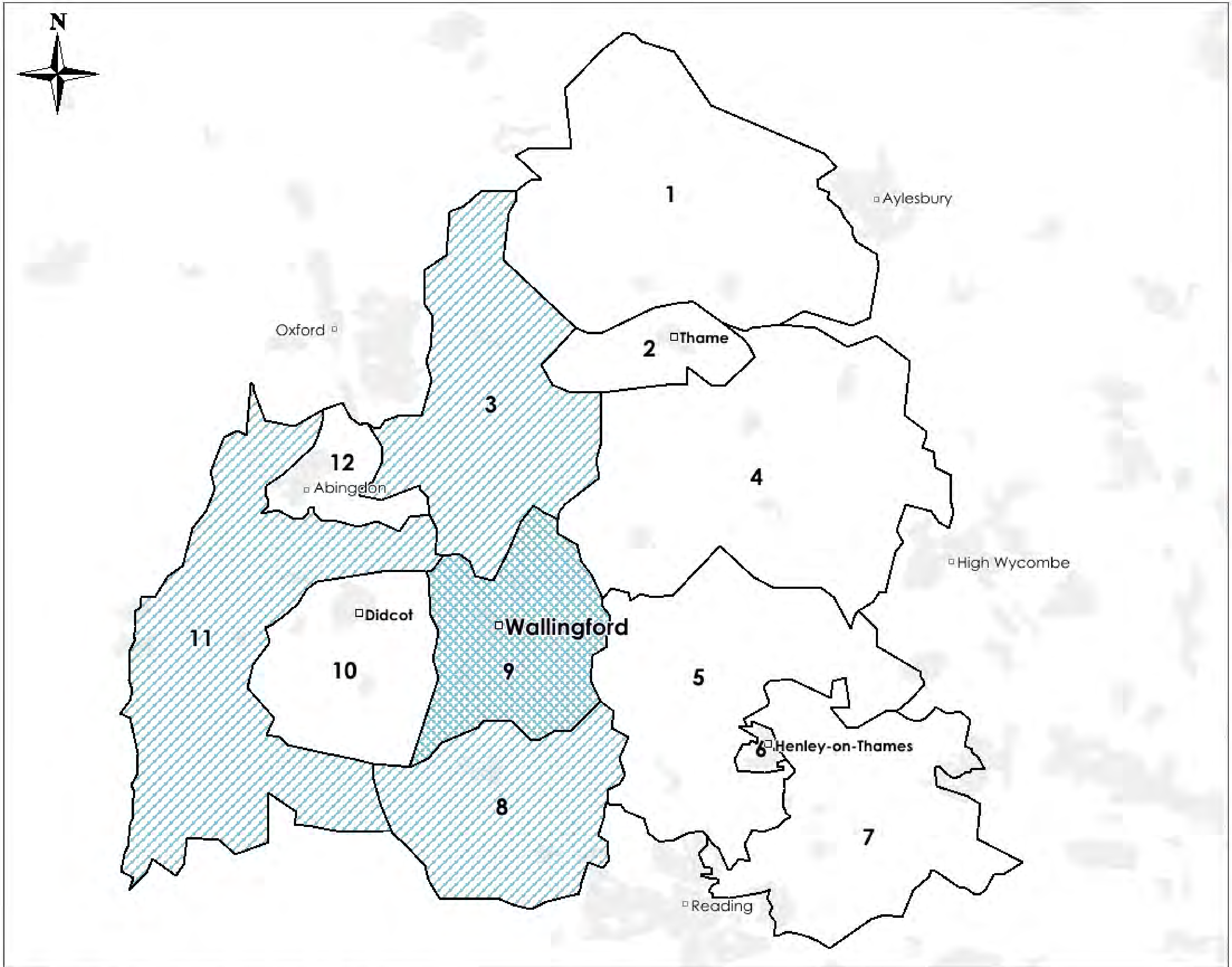
# Plan 12 Wallingford Town Centre Comparison Goods Market Share

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## Plan 12. Wallingford Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

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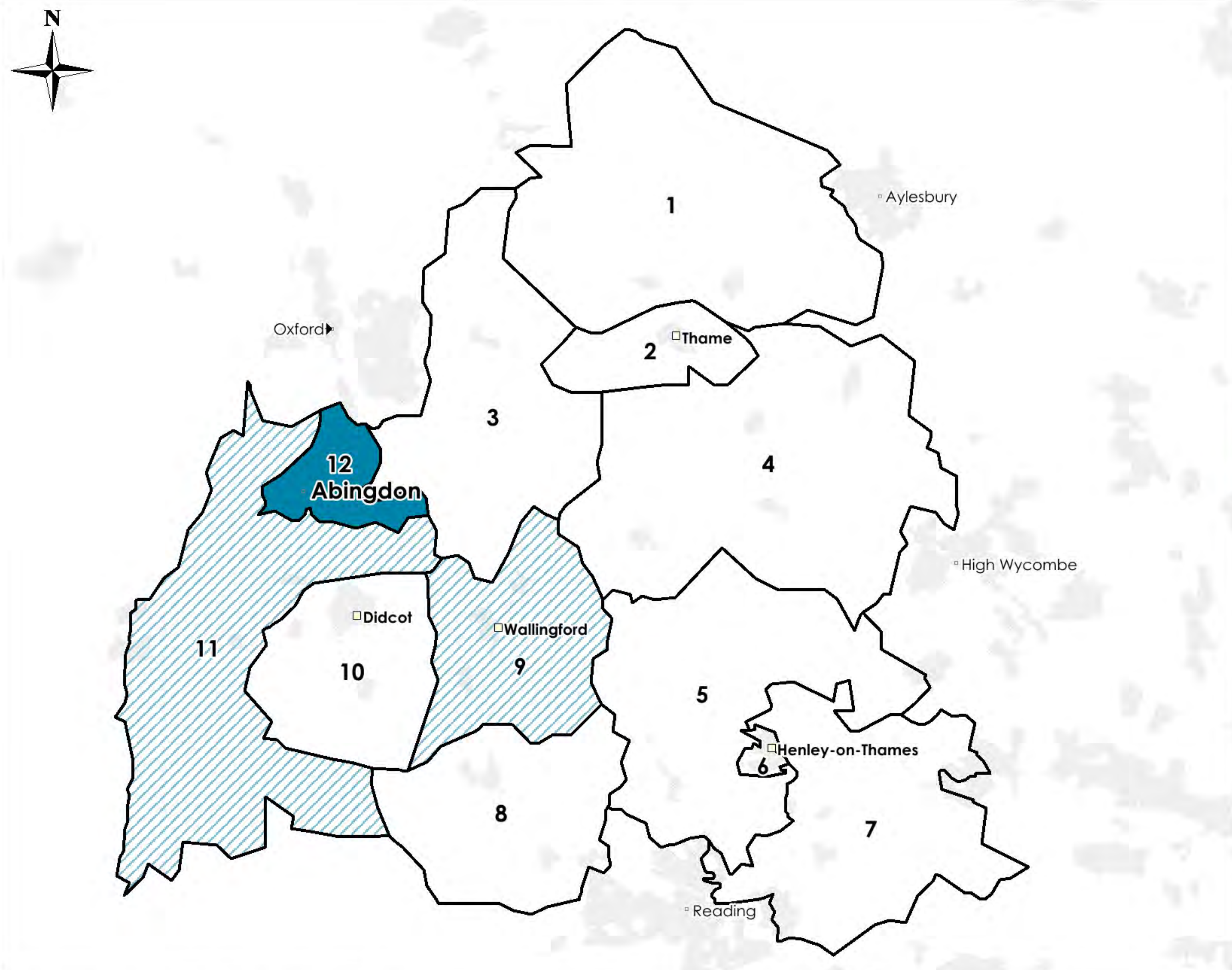
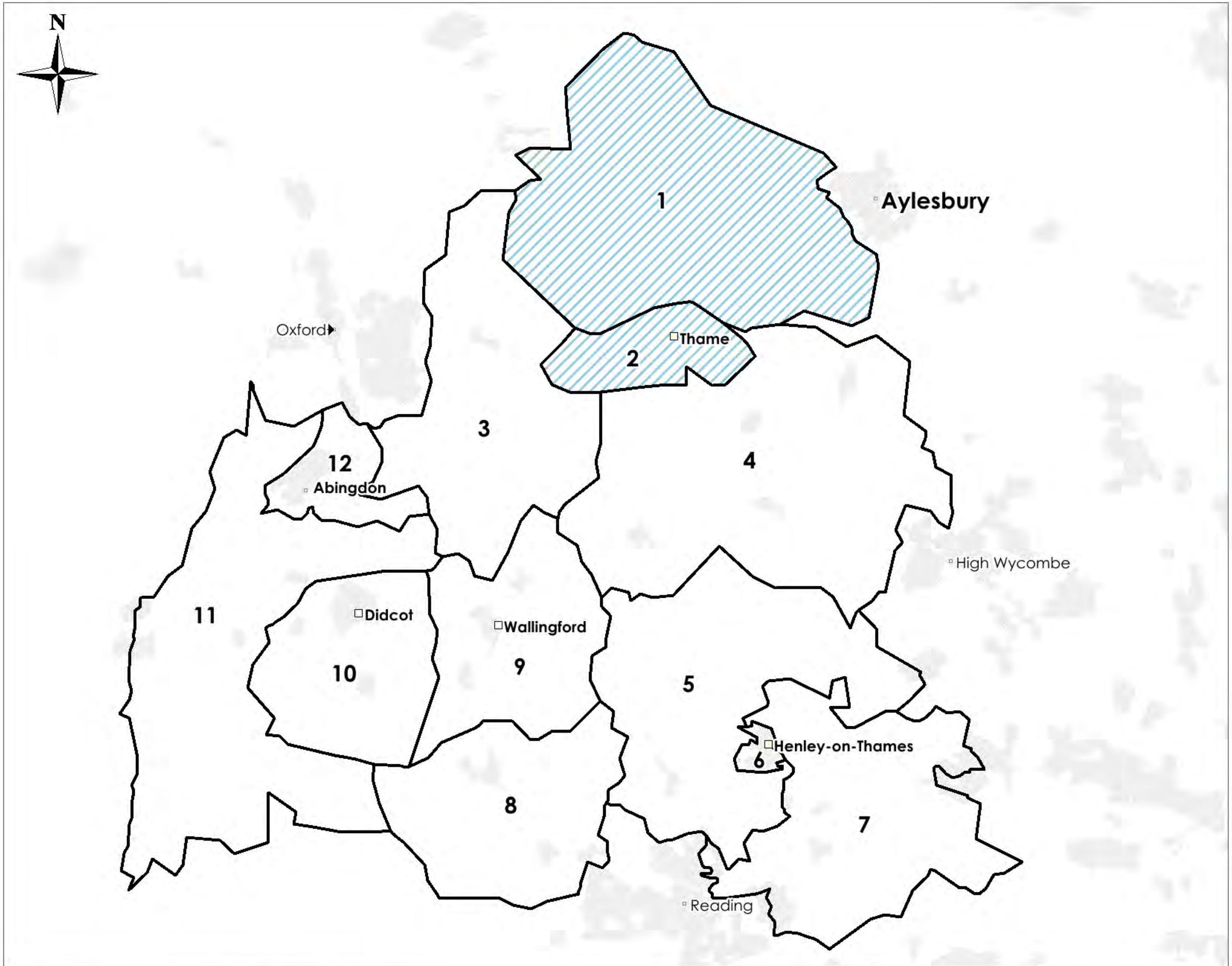
# Plan 13 - 17 Competing Centre Comparison Goods Market Share







# South Oxfordshire




Plan 14. Aylesbury Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+



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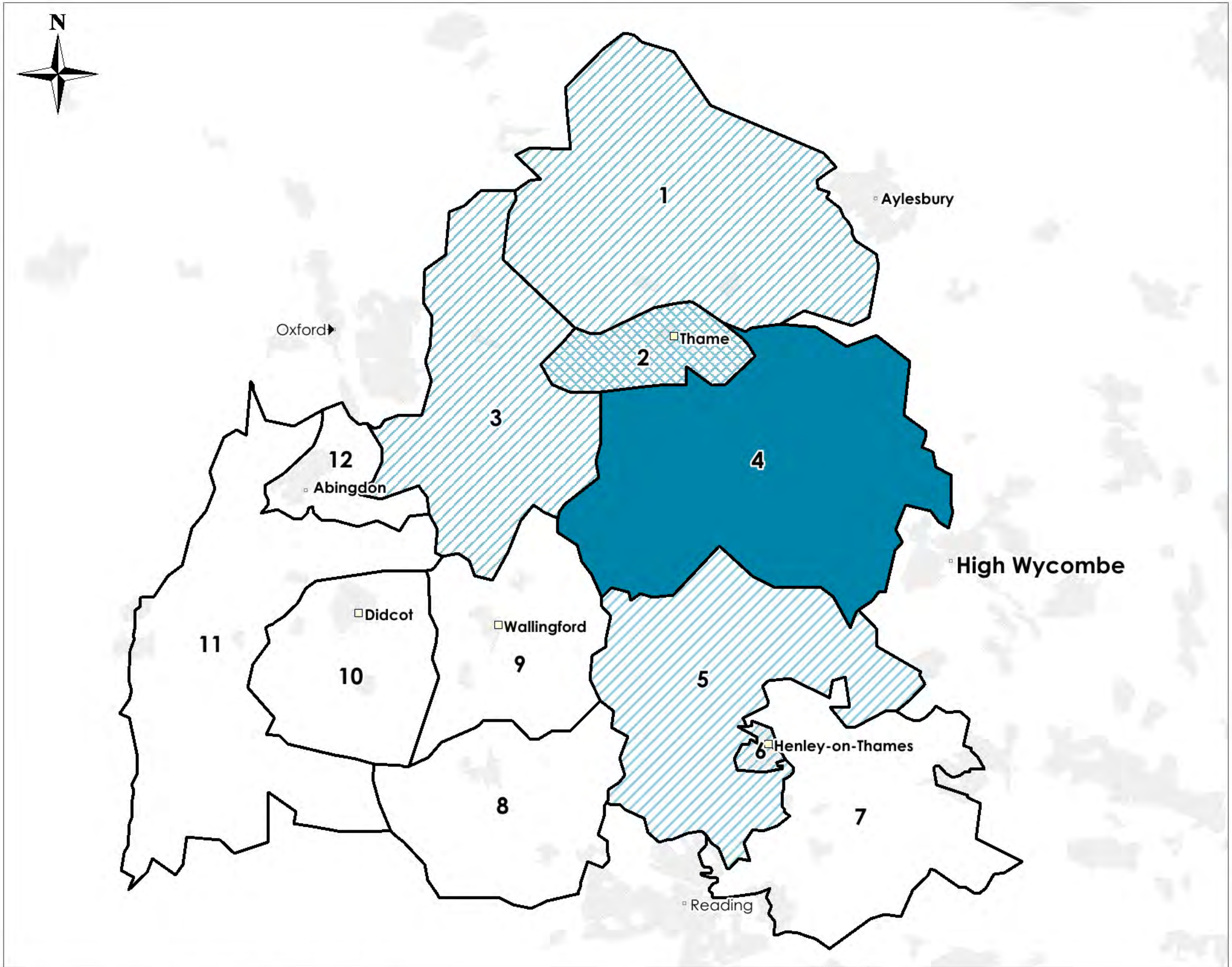


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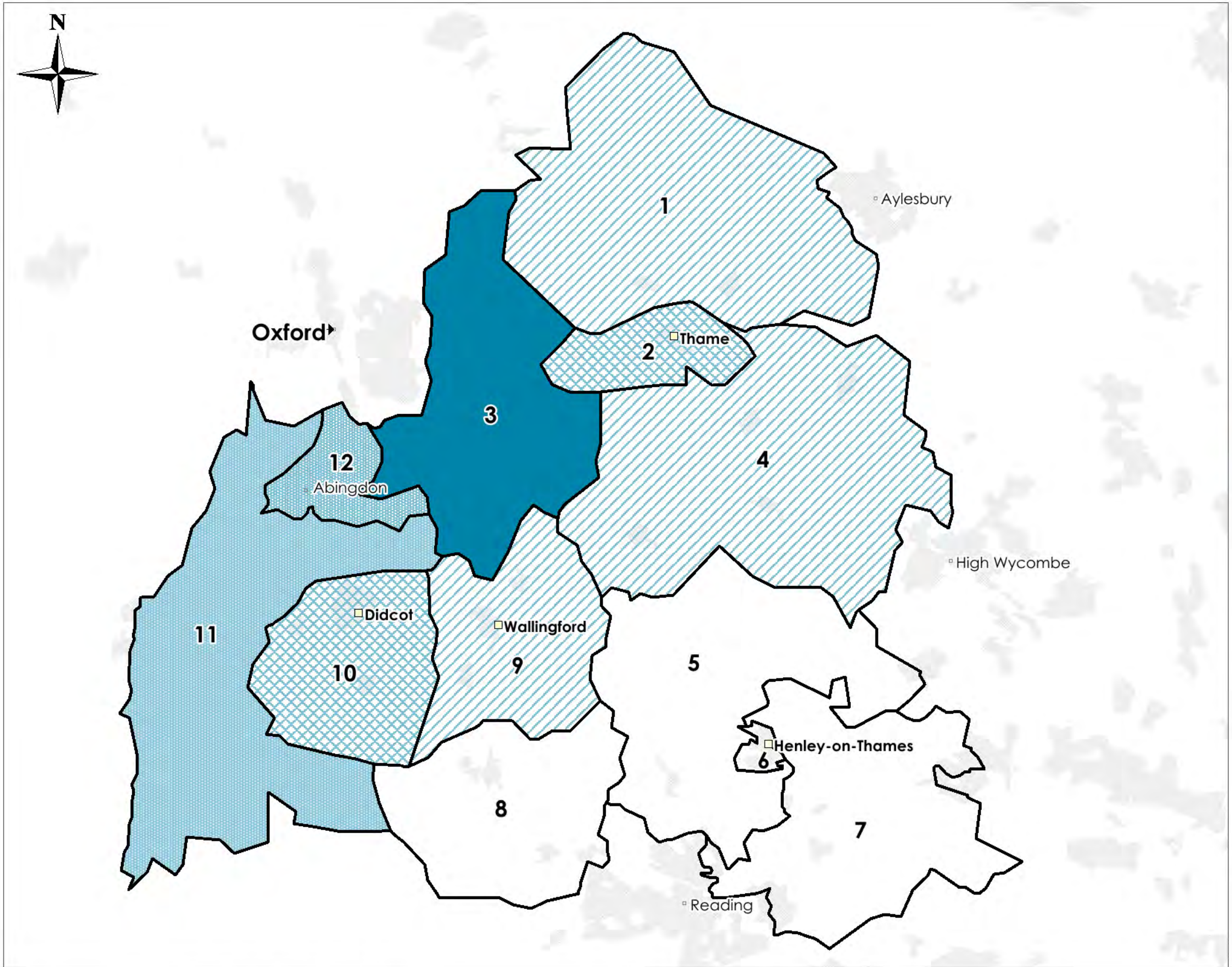
**Plan 15. High Wycombe Town Centre Comparison Goods Market Share**

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

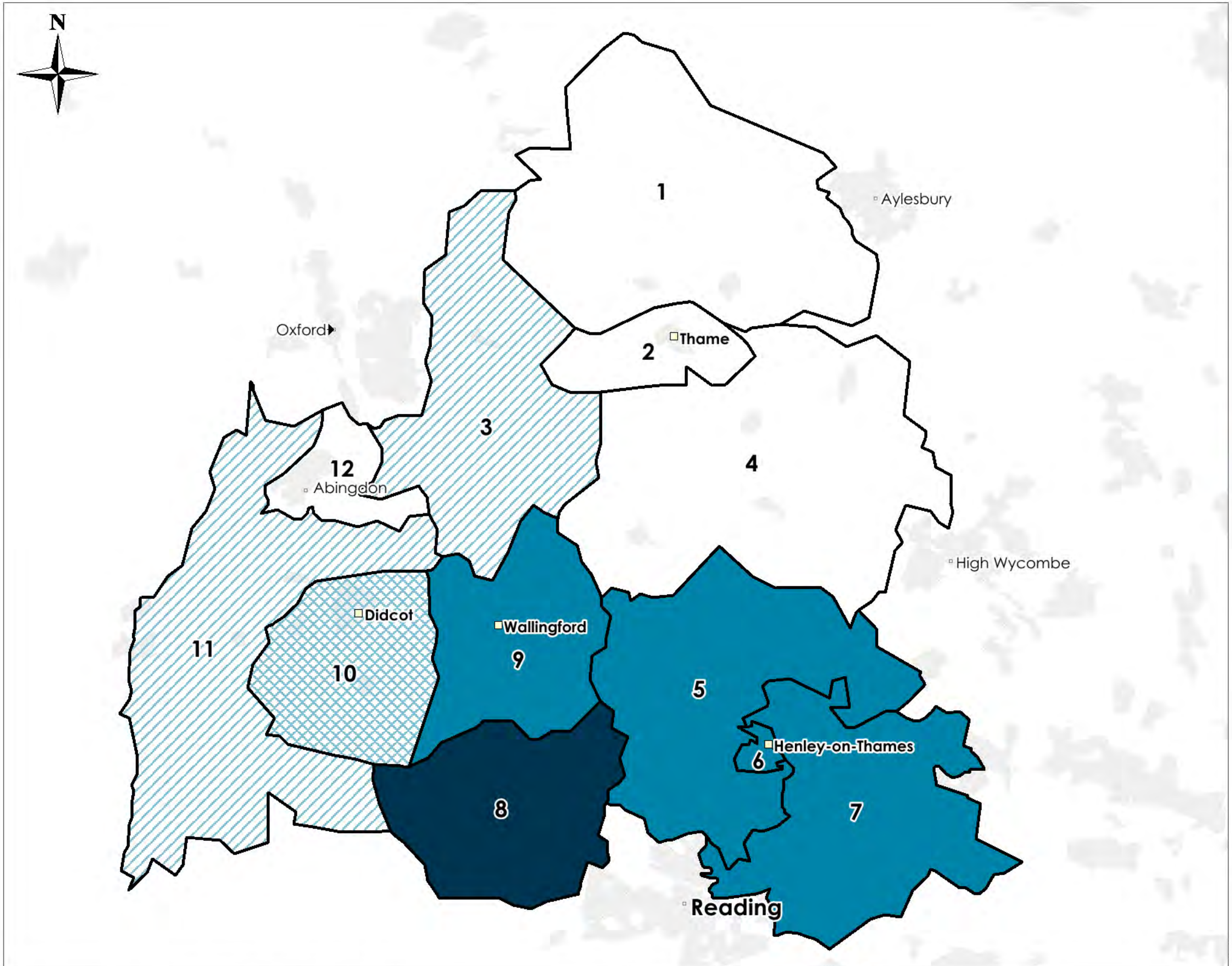



Plan 16. Oxford Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+




Plan 17. Reading Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+





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