The Civic Trust, Wallingford Town Council and South Oxfordshire District Council

Wallingford Town Centre

November 2005
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## Appendices

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1 INTRODUCTION

1.01 DTZ Pieda Consulting was instructed by the Civic Trust in June 2005 to undertake a health check of Wallingford Town Centre as part of the Town Centre Strategy and Action Plan to be prepared by the Civic Trust on behalf of Wallingford Town Council.

1.02 The method of approach adopted to produce the health check is based on the indicators of vitality and viability as set out in Planning Policy Statement 6: Planning for Town Centres published in 2005 which provides an update to the 1996 PPG 6.

1.03 Some indicators of vitality and viability, such as “pedestrian flows”, “customer views and behaviour” and “perception of safety and occurrence of crime” have not been included due to the need for specific survey work. A checklist of the indicators assessed and incorporated within the chapters is set out below:

- Diversity of main town centre uses (by number, type and amount of floorspace).
- The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations.
- The potential capacity for growth or change of centres.
- Retailer representation and intentions to change representation.
- Shopping rents.
- Proportion of vacant street level property.
- Accessibility.
- State of the town centre and environmental quality.

1.04 A series of data sources has been used to compile the health check including the Census of Population 2001, Annual Business Inquiry, Focus, Experian GOAD, HM Land Registry and primary research undertaken by DTZ Pieda Consulting including development site surveys and visual surveys of the town centre.
Location of Wallingford

1.05 Wallingford is located within South Oxfordshire District Council in the County of Oxfordshire in the South East of England. It is located within close proximity to the main town of Oxford and also within close proximity of other smaller centres such as Didcot, Thame and Henley-upon-Thames. In addition Reading is also within close proximity.

1.06 Figure 1.1 below shows Wallingford’s location in context.

![Figure 1.1 Wallingford’s Location in Context](image)

The Report

1.07 The report includes the key indicators of vitality and viability within the following chapters:

- Chapter Two: Socio-economic Overview;
- Chapter Three: Vitality and Viability Assessment;
- Chapter Four: Property Market Assessment;
- Chapter Five: Review of Development Sites and Options; and
- Chapter Six: Conclusions and Recommendations.
2 SOCIO-ECONOMIC ASSESSMENT OF WALLINGFORD

Introduction

2.01 The purpose of this section of the report is to give an overview of the socio-economic profile of Wallingford, assessing the demographic and employment structure and economic trends. The key data sources used to compile the assessment include the Census of Population 1991 and 2001, the Annual Business Inquiry and ONS Neighbourhood Statistics. Where possible the data provided has been benchmarked with local and national comparators e.g. South Oxfordshire, South East Region and England.

Population

2.02 The latest population statistics that are available for Wallingford are taken from the 2001 Census of Population. The town’s population is derived from the data available for the Wallingford North ward; this ward covers the vast majority of the Wallingford urban area. Table 2.1 below presents the population figures for 2001 and shows Wallingford North to have a population of approximately 5,330. In the Local Plan the population of Wallingford town is estimated to be 6,270.

Table 2.1: Population, 2001

<table>
<thead>
<tr>
<th>Geographic Area</th>
<th>2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wallingford North</td>
<td>5,332</td>
</tr>
<tr>
<td>South Oxfordshire</td>
<td>128,179</td>
</tr>
<tr>
<td>Oxfordshire</td>
<td>605,486</td>
</tr>
<tr>
<td>South East</td>
<td>8,000,645</td>
</tr>
<tr>
<td>England</td>
<td>49,138,831</td>
</tr>
</tbody>
</table>

Source: Census of population 2001

2.03 A direct comparison between the Census of Population 1991 and 2001 cannot be undertaken, due to the boundary changes to Wallingford wards that were implemented in 1998. However, data for South Oxfordshire shows an increase in population of approximately 13.5% between 1991 and 2001.

2.04 Wallingford is set to increase its resident population further over the period to 2011 with a number of applications and permissions for residential units.

2.05 The age structure of Wallingford North, as shown in table 2.2 below, indicates a marginally greater proportion of residents of pensionable age than the benchmark areas. The combined proportion of the principal working age groups (16-24 and 25-64) is slightly below that of South Oxfordshire, but above regional and national comparators indicating that, in spite of limited employment opportunities in the town centre, Wallingford is still retaining its working population.
Table 2.2: Age Structure of Population

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Wallingford North</th>
<th>Wallingford North %</th>
<th>South Oxfordshire %</th>
<th>South East %</th>
<th>England %</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4 years</td>
<td>351</td>
<td>6.6</td>
<td>6.2</td>
<td>5.9</td>
<td>6.0</td>
</tr>
<tr>
<td>5-15 years</td>
<td>588</td>
<td>11.1</td>
<td>12.8</td>
<td>12.8</td>
<td>12.9</td>
</tr>
<tr>
<td>16-24 years</td>
<td>517</td>
<td>9.7</td>
<td>10.1</td>
<td>11.8</td>
<td>12.2</td>
</tr>
<tr>
<td>25-64 years</td>
<td>2,948</td>
<td>55.3</td>
<td>55.6</td>
<td>53.0</td>
<td>53.0</td>
</tr>
<tr>
<td>65 years and over</td>
<td>928</td>
<td>17.4</td>
<td>15.3</td>
<td>16.5</td>
<td>15.9</td>
</tr>
<tr>
<td>All</td>
<td>5,332</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

Source: Census of Population 2001

Deprivation and Wealth

2.06 The Index of Multiple Deprivation 2004 contains a number of measures of social and economic deprivation including income, employment, health and disability, environment and living, outdoors, crime and disorder, skills and training. Figure 2.1 below shows the overall levels of deprivation at Super Output area for South Oxfordshire. The map illustrates that, aside from one or two pockets, much of South Oxfordshire does not fall within the worst 60% deprived within the country and is thus relatively affluent.

Figure 2.1: Overall IMD

2.07 When examining individual domains, Wallingford appears to suffer from slightly higher levels of deprivation in respect of crime and disorder and skills and training when compared to its score overall.
2.08 Table 2.3 below provides more detailed information on income levels and is taken from the New Earning Survey 2003. Data at ward level is not accurate enough to present and as such we have used data for South Oxfordshire as a proxy. The data shows the gross weekly earnings for full-time workers and all workers (including part-time). The data indicates that South Oxfordshire has average gross weekly earnings well above that of the benchmark areas. For example, full-time workers’ average gross weekly earnings are £670.1 compared to the national average of £484.9. Although there is no data available for Wallingford, the IMD for the income domain suggests that income may be slightly lower than the average for South Oxfordshire but still above benchmark areas.

Table 2.3: Average Gross Weekly Earnings, 2003

<table>
<thead>
<tr>
<th></th>
<th>£ all workers</th>
<th>£ Full-time workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Oxfordshire</td>
<td>577.6</td>
<td>670.1</td>
</tr>
<tr>
<td>Oxfordshire</td>
<td>453.2</td>
<td>539.4</td>
</tr>
<tr>
<td>South East</td>
<td>445.7</td>
<td>537.4</td>
</tr>
<tr>
<td>England</td>
<td>402.7</td>
<td>484.9</td>
</tr>
</tbody>
</table>


2.09 In terms of housing tenure in Wallingford, table 2.4 below sets out the proportions of tenure for Wallingford North ward and the benchmark areas. Wallingford North displays a different tenure profile to all benchmark areas in that it has a relatively low proportion of owner occupied housing, but a significantly higher proportion of other social rented housing. It also has a low proportion of social rented housing from the council compared to the South East and England.

Table 2.4: Housing Tenure

<table>
<thead>
<tr>
<th></th>
<th>Owned</th>
<th>Social rented from council</th>
<th>Other social rented</th>
<th>Private rented or living rent free</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wallingford North</td>
<td>1,643</td>
<td>63</td>
<td>414</td>
<td>238</td>
</tr>
<tr>
<td>Wallingford North %</td>
<td>69.7%</td>
<td>2.7%</td>
<td>17.6%</td>
<td>10%</td>
</tr>
<tr>
<td>South Oxfordshire</td>
<td>76.6%</td>
<td>1.4%</td>
<td>10.0%</td>
<td>12.0%</td>
</tr>
<tr>
<td>Oxfordshire</td>
<td>70.8%</td>
<td>6.5%</td>
<td>7.8%</td>
<td>14.9%</td>
</tr>
<tr>
<td>South East</td>
<td>74.1%</td>
<td>7.3%</td>
<td>6.6%</td>
<td>12%</td>
</tr>
<tr>
<td>England</td>
<td>68.95</td>
<td>13.2%</td>
<td>6.0%</td>
<td>11.9%</td>
</tr>
</tbody>
</table>

Source: Census of Population 2001

2.10 Given the greater emphasis on affordable housing and a number of new developments that are coming forward close to the town centre, it is likely that this profile of tenure in Wallingford North will have changed slightly from the 2001 census figures to demonstrate an increased proportion of owner occupied housing.
Labour Market Trends

2.11 Economic activity rates are a useful indication of the economic performance and potential locality. The chart below (figure 2.2) indicates economic activity levels in Wallingford North and the Benchmark areas. Wallingford has encouragingly high rates of economic activity of 73.5% of the population aged between 16 and 74 years old. This is in comparison to 66.9% for England and is above the rate for all other benchmark areas. Unemployment rates are marginally higher than for South Oxfordshire but below England.

Figure 2.2: Economic Activity
2.12 Figure 2.3 below shows change in unemployment since 1996 using Claimant Count data. Data is not available at ward level over this time period because of the changes in ward boundaries. Overall, South Oxfordshire has seen a decline of 69% in unemployment levels since 1995 which out weighs the decline experienced by all other benchmark areas.

Figure 2.3: Unemployment Change, 1996-2005 (1996=100)
2.13 Figure 2.4 below illustrates educational attainment amongst those aged between 16 and 74 years old. Wallingford North has a greater proportion of the population with level 4/5 qualifications than the South East and England, but marginally less than Oxfordshire and South Oxford. The proportion of the population with no qualifications is significantly less than that for England but slightly above the other benchmark areas.

Figure 2.4: Educational Attainment
2.14 The occupational structure of the workforce is also a useful indication of the skills and potential wealth of an area. Figure 2.5 below shows the relative representations of each occupation of Wallingford and the benchmark areas compared to England. The data suggests that Wallingford North has relatively high representation in traditionally higher paid occupations such as professional, manager and senior officials and associate professional and technical occupations. This is also the case for South Oxfordshire. There is, however, an under-representation compared to England amongst the lower paid occupations such as process, plant and machine operatives.

**Figure 2.5: Occupational Structure**
Economic Trends

2.15 Table 2.5 below presents the industrial structure for Wallingford North and the benchmark areas. Wallingford North is dominated by the distribution, hotels and restaurant sector (32.7%) and the banking, finance and insurance sector (31.6%). The profile is similar to that of South Oxfordshire, but varies from that of the other benchmark areas in that it has a lower proportion of employment within the public administration, education and health sector and the manufacturing sector.

<table>
<thead>
<tr>
<th>Industrial Sector</th>
<th>Wallingford North</th>
<th>South Oxfordshire</th>
<th>Oxfordshire</th>
<th>South East</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture and Fishing</td>
<td>4.5</td>
<td>1.3</td>
<td>0.6</td>
<td>1.1</td>
<td>0.8</td>
</tr>
<tr>
<td>Energy and Water</td>
<td>0.0</td>
<td>0.5</td>
<td>0.4</td>
<td>0.7</td>
<td>0.6</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>4.3</td>
<td>9.0</td>
<td>12.0</td>
<td>9.8</td>
<td>12.6</td>
</tr>
<tr>
<td>Construction</td>
<td>1.6</td>
<td>3.4</td>
<td>3.1</td>
<td>4.1</td>
<td>4.4</td>
</tr>
<tr>
<td>Distribution, hotels and restaurants</td>
<td>32.7</td>
<td>28.6</td>
<td>23.5</td>
<td>26.3</td>
<td>24.9</td>
</tr>
<tr>
<td>Transport and communications</td>
<td>5.8</td>
<td>4.2</td>
<td>4.5</td>
<td>6.1</td>
<td>6.1</td>
</tr>
<tr>
<td>Banking, finance and insurance</td>
<td>31.6</td>
<td>31.5</td>
<td>24.0</td>
<td>22.6</td>
<td>20.4</td>
</tr>
<tr>
<td>Public administration, education and health</td>
<td>12.5</td>
<td>15.1</td>
<td>27.3</td>
<td>24.0</td>
<td>25.2</td>
</tr>
<tr>
<td>Other services</td>
<td>7.0</td>
<td>6.4</td>
<td>4.7</td>
<td>5.3</td>
<td>5.1</td>
</tr>
</tbody>
</table>

Source: ABI 2003

2.16 Table 2.6 below presents the number of businesses at each geographical level by business size band. The data indicates that Wallingford North and South Oxfordshire have a higher proportion of micro-firms (1-10 employees) than the benchmark areas with 87.5% and 89.3% respectively.

<table>
<thead>
<tr>
<th>Business Size</th>
<th>Wallingford North</th>
<th>South Oxfordshire</th>
<th>Oxfordshire</th>
<th>South East</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-10 employees</td>
<td>87.5</td>
<td>11.0</td>
<td>1.5</td>
<td>0.0</td>
<td>409</td>
</tr>
<tr>
<td>11-49 employees</td>
<td>89.3</td>
<td>8.6</td>
<td>1.8</td>
<td>0.4</td>
<td>7,074</td>
</tr>
<tr>
<td>50-199 employees</td>
<td>85.4</td>
<td>11.4</td>
<td>2.7</td>
<td>0.6</td>
<td>28,682</td>
</tr>
<tr>
<td>200 or more employees</td>
<td>85.6</td>
<td>11.2</td>
<td>2.6</td>
<td>0.6</td>
<td>364,292</td>
</tr>
<tr>
<td>Total</td>
<td>83.7</td>
<td>12.6</td>
<td>3.0</td>
<td>0.7</td>
<td>1,956,279</td>
</tr>
</tbody>
</table>

Source: Annual Business Inquiry, 2003
Summary

- The population of Wallingford North ward currently stands at approximately 6,270, according to the Local Plan, but is set to increase with the development of new dwellings.
- There is a slightly above average proportion of working age population indicating a strong economic position. There is also, however, a marginally above average proportion of the population at a pensionable age.
- Overall, deprivation levels in Wallingford are generally low. Domains with slightly higher levels include Crime and Disorder and Skills and Training.
- Housing tenure in Wallingford North is dominated by owner-occupied dwellings with a relatively low proportion of council rented dwellings.
- Economic activity levels are above average whilst unemployment rates are below most benchmark areas, again indicating Wallingford’s relatively strong economic position.
- Compared to England, Wallingford North’s educational attainment is marginally higher with a lower proportion of the population with no qualifications. Both South Oxfordshire and Oxfordshire as a whole perform marginally above Wallingford North.
- Gross weekly earnings are relatively high compared to national comparators and this is reflected in the dominance of traditionally higher paid occupations such as managers and professionals.
- The industrial structure is focussed on the hotels and distribution sector and the banking, finance and insurance sector. There is a also relatively high proportion of micro-firms.
3 VITALITY AND VIABILITY ASSESSMENT

Introduction

3.01 This section of the report sets out the quantitative structure of land uses within Wallingford town centre and makes comparisons with other towns in the sub-region. It provides a qualitative commentary on the quality of the town centre environment and analyses the accessibility and potential consumer markets.

Retail Hierarchy

3.02 Wallingford Town Centre is one of four main town centres in South Oxfordshire. Henley-on-Thames, Didcot and Thame are the other town centres in the district and are all within a 20 mile radius of Wallingford; Didcot being the closest at 7.8 miles. In addition, Wallingford is also in competition with the sub-regional centres of Oxford, Reading, Aylesbury and High Wycombe. The Oxfordshire Structure Plan does not define the hierarchy of town centres below the level of the four country towns.

3.03 In order to determine the hierarchy of South Oxfordshire’s four main town centres, the Council commissioned research into the extent of their catchment areas for comparison foods and convenience goods shopping. The study was undertaken by Colliers Erdman Lewis in 2000 and described all four centres as district centres meeting the needs of local residents for convenience goods and services that are needed regularly and preferably close to home. In addition, the study concluded that Henley-on-Thames is both the leading comparison goods centre and the largest centre in the district and it is therefore described as a “major district centre”. Didcot, Thame and Wallingford, on the other hand, were described as “minor district centres”.

3.04 The CRE study concludes that Wallingford’s “close proximity to major foodstores in other centres and its own lack of convenience goods floorspace inevitably means that its turnover in this sector is lower than any other town in South Oxfordshire. However, this is not to say that those convenience goods retailers who trade there do so unsuccessfully....In total, the town has an annual turnover of around £38 million (1995 prices), putting it on a par with Thame.”

3.05 Since the commissioning of this study a number of new developments have come on stream which affect the level of competition Wallingford faces. Indeed the Structure Plan set out aims to encourage improved shopping facilities in the four country towns, including Didcot where policy states it should be a “principal location for major new shopping development”. Following this, the development of the Didcot Orchard Centre has greatly expanded the retail offer in the town centre which now encompasses a 225,000 sq ft shopping centre with 31 stores, including a Sainsbury’s (70,000 sq ft) which provides the anchor for the centre, as well as Next, New Look and a range of other retailers.

3.06 Slightly further a field, but nevertheless competing locations, both Oxford and Reading provide a wide range of high street shops, convenience stores and comparison shopping. The Oracle shopping centre in Reading, for example, is a mixed-use scheme which hosts a variety of national multiples and food outlets and which attracts visitors from a wide catchment area, including Wallingford.

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1 South Oxfordshire Shopping Study Update on behalf of South Oxfordshire District Council, May 2000, Colliers Erdman Lewis
Below we have provided details of the scale and nature of shopping in Wallingford and, where possible, compared this to the other three town centres within South Oxfordshire. This has allowed us to demonstrate a clear picture of where Wallingford sits in the retail hierarchy using more up-to-date information than that provided in the CRE study (2000).

**Scale and Nature of Shopping in Wallingford**

The town centre of Wallingford has approximately 17,920 sq m of gross retail floorspace, nearly half of which is dedicated to comparison goods. Retailing is focussed on two main streets of St Martin’s and St Mary’s in addition to a small number of stores on the High Street and Castle Street.

Table 3.1 below sets out the scale of centres within South Oxfordshire. The figures for Didcot are a gross underestimate of the retailing provision within the town centre. The data is taken from the latest available 2004 GOAD centres report, but since then the Orchard centre in Didcot has opened which now provides almost 21,000 m² of retail space, including a new Sainsbury’s and 30 other stores, mainly comparison. With this in mind it is fair to say that Didcot now tops the poll in terms of retail hierarchy within South Oxfordshire and can be described as a “major district centre”. Wallingford is the smallest of centres providing almost 11,000 m² convenience and comparison floorspace and with 70 outlets. Henley-on-Thames, previously described as a “major district centre”, offers over 18,000 m² of convenience and comparison gross floorspace and is now more comparable to Didcot in size.

<table>
<thead>
<tr>
<th>Town Centre</th>
<th>Total Gross Floorspace for all Retail sqm</th>
<th>Total Gross conv. And comp. Floorspace sqm</th>
<th>No. of Cov and Comp outlets</th>
<th>Gross space per Conv./Comp. Outlet sqm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wallingford</td>
<td>17,920</td>
<td>10,960</td>
<td>70</td>
<td>156.5</td>
</tr>
<tr>
<td>Thame</td>
<td>27,908</td>
<td>13,470</td>
<td>72</td>
<td>187.1</td>
</tr>
<tr>
<td>Didcot</td>
<td>30,723</td>
<td>6,958</td>
<td>41</td>
<td>169.7</td>
</tr>
<tr>
<td>Henley on Thames</td>
<td>47,213</td>
<td>18,413</td>
<td>128</td>
<td>143.9</td>
</tr>
</tbody>
</table>

Source: Goad Centre Report 2004

The unit sizes within Wallingford are approximately 156.5 m². However, this will not take account of the new and larger Waitrose development. Henley-on-Thames has relatively small unit sizes in comparison to the other centres. However, in wider terms, all of the centres have relatively small unit sizes reflecting the lack of national multiples who often seek large premises.

Table 3.2 below shows that Wallingford town centre comprises 2,880 m² of convenience floorspace and 8,080 m² of comparison floorspace. In terms of units the number of comparison units far outweighs convenience shopping with over 50% of the total. The number of vacant units in Wallingford accounts for 14% of the total number of units and 13% of floorspace indicating a relatively high vacancy rate. However, it is important to
bear in mind that this is based on the latest available Goad data only recent observations have suggested that there are now just 7 vacant units including the former Waitrose site, and two of which are under offer. The actual vacancy rates is thus lower than 13%.

Table 3.2: Wallingford Town Centre Retail Offer

<table>
<thead>
<tr>
<th>Use</th>
<th>Total Gross Floorspace sq m</th>
<th>% Wallingford</th>
<th>Units</th>
<th>% Wallingford</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>2,880</td>
<td>16.2</td>
<td>7</td>
<td>6.7</td>
</tr>
<tr>
<td>Comparison</td>
<td>8,080</td>
<td>45.3</td>
<td>63</td>
<td>51.2</td>
</tr>
<tr>
<td>Retail Services</td>
<td>4,550</td>
<td>25.5</td>
<td>36</td>
<td>29.3</td>
</tr>
<tr>
<td>Vacant</td>
<td>2,320</td>
<td>13</td>
<td>17</td>
<td>13.8</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>17,830</strong></td>
<td><strong>100</strong></td>
<td><strong>123</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Source: GOAD Centre report 2004

**Convenience Shopping**

3.12 The town centre has seven convenience store units and one large supermarket (Waitrose), which between them provide the principal food offer in the town. It has a number of smaller convenience stores including a baker, an off-license and grocery stores.

3.13 In close proximity to Wallingford there are a number of other larger foodstores that are likely to attract a significant proportion of the town’s expenditure on convenience goods. These include Tesco's and Sainsbury’s at Didcot, which are approximately six miles away. However, the development of the new larger Waitrose store in Wallingford will have helped to improve Wallingford’s competing powers in this respect.

**Comparison Shopping**

3.14 Comparison shopping dominates the retail offer in Wallingford, the majority of which are independent traders. Furniture, carpets and textiles account for the greatest proportion of comparison retailers and this is in part due to the collection of antiques shops on the High Street. Electrical, home entertainment and phones and video retailing also account for a considerable proportion as does books, arts/crafts, stationers/copy retailers. There is one mixed and general clothing department store which is an independent retailer situated opposite the former Waitrose site.
With the exception of Waitrose, the key national multiple retail offer is provided by Boots and Clarks. These are supplemented by a handful of smaller national multiples such as Blockbusters and Bakers Oven. It is thus inevitable that comparison goods expenditure leakage will take place due to the range of products on offer in other centres such as Didcot and Henley on Thames.

**Retail Services**

Retail services encompasses a variety of uses including A1, A2, A3 and B1 uses such as restaurants, cafes, takeaways, public houses, banks and building societies, hairdressers and beauty salons, repair and hire shops and estate agents and travel agents, as well as public sector services.

Retail services in Wallingford include a number of restaurants, cafes and fast food outlets. There are, for example, several Italian restaurants including a Pizza Express and a newly opened independent Italian restaurant in the former post office building on St Martin’s Street. There are also a collection of Indian restaurants on the High Street and a number of small cafes and sandwich shops throughout the town centre, as well as five public houses.

Leisure attractions in Wallingford are fairly basic. The Corn Exchange in the Market Place accommodates the town’s 175 seat cinema and theatre and the Regal Centre hosts a variety of events, clubs and organisations. The Wallingford Squash and Sports Club is located on the High Street along with the Hightone Health and Fitness Club.

The town centre has three high street banks (Lloyds, NatWest and Barclays), one building society (Nationwide) and six estate agents. There is also a travel agent, solicitors and insurance brokers.

**Vacant Units**

The number of vacant units provides an important indicator of the health and performance of the town centre.

For comparison purposes with other centres we have used the latest available Goad data (2004) which indicated the number of vacant units within Wallingford was 17 (at present this figure is 7), accounting for 2,320 m² of floorspace. This figure may be inflated due to the number of former vacant units that were being developed by Waitrose.
Table 3.3 below compares vacancy rates in Wallingford with those in the other centres in South Oxfordshire using the Goad 2004 data. Wallingford has a higher vacancy rate than the GB average and is also above that of Thame and Henley-on-Thames. Didcot has a very high vacancy rate of 20.5% compared to 10.2% for the national average.

**Table 3.3 Vacant Units**

<table>
<thead>
<tr>
<th>Town Centre</th>
<th>Number of Vacant Units</th>
<th>Vacancy Rate %</th>
<th>GB Vacancy rate (2004) %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wallingford</td>
<td>17</td>
<td>13.7</td>
<td>10.2</td>
</tr>
<tr>
<td>Thame</td>
<td>4</td>
<td>0.03</td>
<td>10.2</td>
</tr>
<tr>
<td>Didcot</td>
<td>33</td>
<td>20.5</td>
<td>10.2</td>
</tr>
<tr>
<td>Henley on Thames</td>
<td>17</td>
<td>5.5</td>
<td>10.2</td>
</tr>
</tbody>
</table>

Our own estimates have calculated the number of vacant units in Wallingford to be 9. However, according to Estate Gazette² data as of August 2005 the number of vacant retail units is 10, although this figure does not include the now vacant former Waitrose site on St Martin’s Street.

The location of vacant units within Wallingford is fairly evenly spread around the principal shopping streets with a small cluster on St Martin’s Street, including the former Waitrose site and the units opposite. However, these units are newly developed and thus are likely to require a sufficient marketing period before being taken-up.

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² Estate Gazette figures should be treated with caution as they do not provide a fully comprehensive picture of vacancy rates.
Mix of Uses

3.25 The town centre has a variety of uses within it which are illustrated in figure 3.1. This shows premises in Wallingford town centre by use class, including vacant properties.

Figure 3.1: Use class map to show mix of uses
Street Market

3.26 The street market in Wallingford town centre takes place every Friday and includes a selection of stalls selling a range of products including fruit and vegetables, flowers, sweets, clothing, fresh fish and meat. On the day of our visit the market looked to be attracting a sizeable number of people and patronage was steady throughout the morning.

Edge of Centre/Out of Town Retail Developments

3.28 There are no edge-of-centre or out of town retail developments in Wallingford which act in competition to the Town Centre.

State of the Town Centre Environmental Quality

3.29 Wallingford is steeped in history. It is one of the oldest Boroughs in England and had its first charter granted in 1155. Wallingford Castle, built by William the Conqueror, was used as a royal residence until the time of the Black Death. Indeed the town was once one of the prime towns in the country. Further back in its history Wallingford was a Roman town and after that an Anglo-Saxon settlement. The town now functions as a market town consisting of attractive historical buildings and shop frontages and narrow streets displaying characteristics of the town’s history.

Image and Identity

3.30 Wallingford has a strong association with its historical past and many of the buildings reflect this in their appearance and general character. There is, however, a range of styles of buildings with ornate shop frontages interspersed with slightly more modern developments. In general, new development has been in keeping with the town’s character; recently developed retail outlets opposite the former Waitrose site, for instance, have been developed in the same style and frontage as the existing units on the street.

3.31 The York paved market place and narrow roads lend a sense of gentility to the town centre whilst also reflecting its historical background. There are, however, a handful of units which have not been as well maintained or designed. These include the former Waitrose premises and the units 18 to 20 on St Martin’s Street. Indeed, this end of town in general lacks the character that is more apparent towards the northern end of the town centre.
Wallingford's location on the river is somewhat overlooked. There is, for example, a distinct lack of signage from the river to the town centre and visa versa. Wallingford could benefit from an enhanced identity which includes a riverside town, in addition to its identity as an historical market town.

**Town Centre Layout**

The town centre is positioned on two main streets – St Martin’s and St Mary’s which run parallel forming a central island accommodating retail space, a church and the Town Hall. In addition, the High Street runs at right angles to the main shopping streets and provides the main road route through Wallingford. The town centre is thus compact and inward facing and somewhat hidden from view. The new Waitrose store is located on the High Street and the corner of St Martin’s Street and thus draws visitors towards the centre. However, pedestrian access from the car park to the main shopping streets is through a narrow alleyway which is neither inviting nor obvious. This is also the case with a number of other car parks around the town centre and forms a poor first impression for those walking into town.

**Public Realm**

The Market Place and the Town Hall provide a central focus for the town centre with plenty of public space and restricted vehicular access. When the Market Place is not in use as a market, the space provides a small seating area, but is somewhat exposed and inactive. In addition, space directly in front of the Town Hall is under cover and provides further seating which tends to be occupied by those waiting for buses. There is also a small seating area situated opposite the new Waitrose which is well maintained and provides an attractive area for visitors to rest. There are large areas of green space either side of the town centre within easy walking distance.

There is a mixture of street paving within the town centre including york paved areas, paving slabs and concrete. Although these are generally well maintained they lack co-ordination with a mixture of historical and modern designs. Some of the pavements are fairly uneven. There is little evidence of graffiti or vandalism and the interspersal of residential units within the town centre provide natural surveillance and lend a sense of security to the centre.
The Civic Trust, Wallingford Town Council and South Oxfordshire District Council  
Wallingford Town Centre  
November 2005

**Gateways**

3.36 There are two main vehicular access points into the town centre. These are both via St Martin’s Street at the northern end (from the High Street) and the southern end (via St Leonard’s Square). St Leonard’s Square comprises a small roundabout and open space surrounded by retail and residential units. Signage is poor and the layout is somewhat confusing. There is, for instance, no obvious impression that one is about to enter a town centre when arriving at St Leonard’s Square. The new Waitrose premises on the High Street now dominates the approach to Wallingford on this route, but again there is a lack of signage to highlight the presence of the town centre.

3.37 As previously mentioned, pedestrian access from the car parks to the town centre often takes pedestrians through narrow alleyways, which can be dark and uninviting. There is also a lack of signage which does little to draw pedestrians into the town centre.

3.38 A further access point is from the river. There are limited moorings along the river, but during the summer months passers-by do moor along the river bank and visit the town centre and stock up on supplies. However, signage from the river is poor and there is little to alert visitors that there is a town centre within just a few yards walking distance. Furthermore, if additional moorings were provided there would be the potential to increase the number of visitors to the town centre. Henley is a prime example of increased spending through its ability to attract river visitors.

**Landmarks**

3.39 As a result of Wallingford’s historical background, there are a number of buildings of historical significance that lend a sense of character to the town. These include the Town Hall built in 1670, and St Mary’s Church set behind this. There are also a number of public houses of historical significance, and the George Hotel.
Accessibility and Transportation

3.40 This section of the chapter assesses the accessibility of Wallingford town centre in terms of both private and public transport facilities, and also the frequency of those facilities, to help attract people to the centre.

Car Access

3.41 The principal routes into the town centre via car are the A329 connecting to Newbury (approximately 16 miles) and the A4074 connecting to Oxford (approximately 10 miles) and Reading (approximately 14 miles). On arrival in Wallingford there are a number of small signs to car parks but directions to the town centre are minimal.

3.42 The main shopping streets of St Martin’s and St Mary’s are narrow roads that are used by cars, buses and lorries servicing shops. Although through town traffic is generally light, there are some issues with congestion caused by larger vehicles, including buses, using the narrow roads and sometimes causing blockages. A one-way policy operates at the southern end of St Martin’s Street and St Mary’s Street.

3.43 The town centre is served by five public car parks providing a total of 526 spaces. In addition, there are a small number of private car parks for individual establishments such as public houses and hotels as well as around 20 informal spaces along the riverside. Table 3.4 below provides a break down of the public car parks within the town centre.

Table 3.4: Public Car Parks Servicing Wallingford Town Centre

<table>
<thead>
<tr>
<th>Car Park</th>
<th>Total Spaces</th>
<th>Pricing</th>
<th>Long/Short stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>St Albans/Waitrose</td>
<td>185</td>
<td>2hrs = 70p</td>
<td>Short (2hrs max)</td>
</tr>
<tr>
<td>Cattle Market</td>
<td>152</td>
<td>1st hour free</td>
<td>Long</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 hrs = 70p</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 hrs £1.70</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>8hrs = £2.20</td>
<td></td>
</tr>
<tr>
<td>Goldsmiths Lane</td>
<td>135</td>
<td>1st hour free</td>
<td>Long</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 hrs = 70p</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 hrs £1.40</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>8 hrs = £3.20</td>
<td></td>
</tr>
<tr>
<td>Thames Street</td>
<td>30</td>
<td>2hrs = 70p</td>
<td>Long</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 hrs £1.70</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>8 hrs = £2.20</td>
<td></td>
</tr>
<tr>
<td>Castle Street</td>
<td>21 spaces</td>
<td>8 hrs £1.50</td>
<td>Long</td>
</tr>
</tbody>
</table>

Source: Civic Trust, South Oxfordshire District Council and DTZ survey
The St Albans/Waitrose car park has recently been expanded from 120 spaces to 185 spaces to cater for the new Waitrose development. It is, however, limited to two hours which traders feel is insufficient for visiting other shops in the town. There are consequently calls from other town centre traders for an extension to three hours in order to help improve the wider trading performance within the town.

Observations of all car parks on a Friday (market day) and a non-market day showed them to be in good use and largely full. Our surveys also concluded that illegal street parking occurs around the market place.

**Rail Access**

There is no rail access in Wallingford. There are stations nearby in Cholsey and Didcot providing services to London, Reading and Oxford. Both of these stations can be reached via car or bus. The absence of a station in Wallingford is perceived to be an issue for the town as it is thought that the provision of a station would greatly increase the attractiveness of the town as a place to live and work.

**Bus Access**

The principal bus stops within Wallingford are located outside the Music Box in the market place and the Town Hall. There are a number of other stops located around the town centre and edges of the town centre serving the more residential areas.

Table 3.5 below presents the main bus routes to key locations from Wallingford. The table shows the quickest routes that are available Monday to Saturday.

<table>
<thead>
<tr>
<th>Journey</th>
<th>Service/Operator</th>
<th>Journey Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wallingford to Oxford</td>
<td>X39, Benson Marina to Oxford St Aldates via Wallingford Town Hall</td>
<td>From Wallingford to Oxford approx 30 mins</td>
</tr>
<tr>
<td>Wallingford to Didcot</td>
<td>Bus 130, Wallingford Music Box to Didcot Broadway</td>
<td>Approx 23 mins, or 16 mins to Didcot Tesco</td>
</tr>
<tr>
<td>Wallingford to Reading</td>
<td>X40 RAF Benson to Reading Station via Wallingford (Bakers Oven)</td>
<td>Wallingford to Reading approx 33 mins</td>
</tr>
<tr>
<td>Wallingford to Abingdon</td>
<td>X15 Wallingford to Witney via Abingdon High Street</td>
<td>Wallingford to Abingdon approx 19 mins</td>
</tr>
</tbody>
</table>

These services run regularly from Monday to Friday and are at least half hourly during peak times. The table indicates that all journey times are approximately half an hour or less highlighting Wallingford’s central and accessible location, but also the proximity of competing centres and thus the ease with which people can go elsewhere.

**Pedestrian and Cycle Access**
The town centre of Wallingford is fairly compact and is surrounded by tight knit residential areas making access for local residents easy. Within the centre itself there are pedestrianised areas towards the north end of St Mary’s Street and around the Market Place, surrounding the Town Hall and along Church Lane. Other than this, all vehicles have access to the town centre and with narrow pavements and roads pedestrians are often compromised for space with vehicles.
The pedestrian links between the car parks and the town centre are poor and often comprise narrow alleyways (Goldsmiths Lane car park). There is also a lack of signage to guide pedestrians to the town centre from the car parks. There are very few pedestrian crossings but due to the narrow roads vehicles are often forced to drive slowly and so pedestrians tend to cross roads at any point convenient to them.

Cycle lanes are provided along the High Street and the north end of the town centre. Roads are, however, extremely narrow and cyclists often share space with motorised vehicles. There is a bike rack at the rear of the new Waitrose but other than this there is little provision for cyclists. The South Oxfordshire Local Plan states that planning permission will be granted for proposals to improve and extend the footpath and cycleway network provided that there are no adverse effects on the environment or amenities of residents.

Other Access

The River Thames at Wallingford, which runs at right angles to the High Street, provides another point of access to the town centre. Moorings along this stretch of the river are popular in the summer due to the presence of a large public house and open air swimming pool on either side of the river bank. Access from the river to Wallingford town centre can easily be gained in no more than 200 yards. However, signage from the river to the town centre is minimal.

Access for Disabled and Elderly People

There are a number of services and facilities for disabled and the elderly within Wallingford town centre. All of the public car parks have designated spaces for disabled badge holders. There is a town centre taxi rank which provides easy access to the main retail areas and there are public toilets with disabled facilities. The Town Hall undercroft provides shelter and some seating although seating areas at bus stops themselves are lacking.

There is a dial-a-ride scheme which operates all week across South Oxfordshire but specifically covering areas including Wallingford on a Friday. The service is free for members and costs £2 per journey for non-members.

Identification of Potential Consumer Markets

Wallingford has the potential to attract a variety of consumer markets. Each of those that we consider to be most significant is discussed below:

Food and Convenience – the new Waitrose store, as well as a number of smaller convenience retailers and the weekly market, attracts people doing their weekly shopping or top-up shopping in Wallingford. Although there is significant competition from nearby centres such as Didcot, which has a Sainsbury’s and Tescos, Wallingford is convenient for residents as well as those in surrounding villages.
3.58 **Clothes and Fashions** – Wallingford town centre has a number of small clothing retailers including independent shoe shops, hat shops, boutiques, children’s clothing and a department store (Pettits). Although it lacks in national multiples and faces competition from major centres such as Reading and Oxford as well as Didcot, it nevertheless provides a clothing and fashion offer, which tends to be of a higher quality/expense than non-independent stores. The CRE study also highlighted the potential of this sector in terms of consumer expenditure. In a survey undertaken by them it was found that the conversion rate for the number of people purchasing clothing and footwear who did not originally have intentions of buying these types of product before they visited the town centre was significantly high. This highlights two points. Firstly, that Wallingford has the ability to capture this type of market, and secondly, that people are unaware of the offer Wallingford has in this respect until they actually visit the town centre.

3.59 **Antiques** – Wallingford town centre has a cluster of antique stores on the High Street and attracts a number of visitors specifically for this type of product. The shops sell a range of antiques including furniture, rugs/ Carpets, ornaments and jewellery and continue to provide Wallingford with a unique offer to visitors. Although there is little potential to expand this sector it does provide Wallingford with a unique offer and something which can also act as a tourist attraction.

3.60 **Eating and Drinking** – there are a number of public houses, restaurants, cafes and takeaways in Wallingford town centre which add to the retail experience. The range of eateries includes Indian, Thai, Italian, Chinese as well as traditional public houses serving food. There is, however, a perception that Wallingford’s offer in this respect could be improved, particularly in terms of making the town centre a pleasant and enjoyable environment for residents, visitors and tourists alike. There are, for example, no eating/drinking areas to sit outside and enjoy the views of the market place and Sunday openings are limited meaning that weekend visitors are restricted in their choice.

3.61 **Tourists/visitors** – Wallingford attracts tourists and visitors throughout the year for attractions such as the Castle Gardens and meadows, the museum, the River Thames, the farmers market, historic walks and the town centre itself. Accommodation for visitors includes the George Hotel as well as good quality B&Bs. Income from the tourist industry within South Oxfordshire is currently estimated to be £160m, but the district council have aspirations to increase this over a 10-year basis, hence Wallingford could play a role in this aspiration. Whilst residents are concerned that Wallingford retains its character, including its tranquil nature, there is the potential to expand the tourist industry through simple changes such as improved marketing, Sunday openings and re-branding to make more of features such as the castle gardens and meadows and the river setting.

**Summary**

3.62 With regards to the vitality and viability assessment the key findings were as follows:

3.63 **Retail Hierarchy** – Wallingford acts as a local district centre mainly to residents and those from surrounding villages. Its geographic location means it faces competition from other local centres such as Didcot and Henley-on-Thames, as well as larger centres such as Oxford and Reading.

3.64 **Scale and Nature of Shopping** – the town centre has approximately 17,920m² of retail floorspace situated on two main streets and which, for the most part, consists of comparison goods. Convenience shopping is dominated by the new Waitrose store and
comparison shopping is largely dominated by independent retailers. There are some multiples and key retailers including a Boots. Retail services including public houses, cafes and restaurants, banks and building societies and a limited number of leisure services. There is, in addition, a weekly street market and fortnightly farmers market. The number of vacant units is thought to be between 7 and 10. Although our data for comparison purposes indicates that vacancy rates are above average, in reality this is not necessarily the case.

3.65 **Town Centre Environmental Quality** – Wallingford’s historical background is reflected in the characteristics of the town including shop frontages, paving and landmark buildings. The public realm is generally of good quality and there is little evidence of decay or decline. The layout of the town is somewhat inward facing and lacking in significant gateways which draw people into the centre. This is particularly the case with routes to and from public car parks serving the town centre.

3.66 **Accessibility** – access by car to the town centre is via two A roads connecting to Newbury and Oxford. Car parking provision in the town centre is good with a number of car parks situated around the centre and within easy walking distance. Bus routes connect Wallingford to all local centres within South Oxfordshire as well as centres further afield, including Oxford and Reading, within reasonable journey times and frequency. Pedestrian and cycle access within the town centre is reasonable, although there are issues over the compromise of space between motor vehicles and other uses. There is no direct rail access for Wallingford.

3.67 **Potential Consumer Markets** – Wallingford has the potential to attract a number of consumer markets. Those that we consider most likely are as follows:

- Food and Convenience;
- Clothes and Fashions;
- Antiques;
- Easting and Drinking; and
- Tourists/Visitors.
4 PROPERTY MARKET ASSESSMENT

Introduction

4.01 The section of the report has been compiled with the aim of investigating the commercial office, retail, and leisure / hotel property markets. We have provided analysis of current requirements, rental information, yield details and future prospects. In addition, the residential property market has been investigated.

4.02 The competitor locations of Didcot, Oxford, Henley and Reading have also been considered to place Wallingford in the context of the wider Oxfordshire / Berkshire region.

4.03 The remainder of this section is set out under the following headings:

• Retail Sector;
• Office Sector; and
• Residential Sector.

Retail Sector

National Market

4.04 Over the past 50 years the retailing industry in the UK has changed dramatically. Shops are less likely to be found clustered together in the central market place of towns and villages, and small specialist retailers are not the norm. In the convenience food market, for example, the market is dominated by a few very large retailers, often operating out of large-format stores at both in- and out-of-town locations.

4.05 The reasons for these changes reflect wider patterns of social and economic change: businesses have become global, consolidating the retail industry into a handful of giant companies. Greater disposable income has brought increased car ownership and spending power, allowing for changes in behaviour among consumers. Relaxation of retail planning policy by government, particularly in the 1980s, added impetus to the move by some retailers to out-of-town locations.

4.06 These changes have had a number of positive impacts. Greater choice can now be offered to a larger number of people as:

• larger stores can carry a wider range of goods, both food and non food;
• consolidation of goods into a smaller number of highly accessible shops is more convenient, particularly for those with hectic lifestyles;
• more powerful companies generally have greater purchasing power, resulting in cheaper goods for consumers;
• and out-of-town locations are often less disruptive, in terms of noise and congestion, than in-town locations.

4.07 However, there have also been serious negative impacts, including:

• increased car use, owing to the growth in edge- and out-of-town shopping
• the growth of some centres at the expense of others;
• the decline of some town, district and local centres, resulting from an inability to compete;
• less diversity of shops, particularly independent retailers, leaving communities with less variety and places with less distinctiveness;
• and greater buying power for retailers (which can weaken suppliers).

4.08 In relation to convenience goods, the trend of the supermarkets has been to develop smaller in-town stores, further increasing the rate of displacement of independent shops - either through greater efficiencies achieved by economies of scale, or by acquiring smaller chains. Tesco, for example, has acquired TNS stores (previously 'Nite and Day' and 'One Stop') and Administore ('Europa', 'Harts' and 'Cullens'). Meanwhile, comparison goods retailers are still at the stage of dispersing from high streets to edge-of-town and out-of-town centres. This movement is extending increasingly to clothes retailers.

4.09 Hypermarkets, selling groceries and a wide range of non-food items, ranging from health and personal care products, clothing, and home and leisure goods, are the fastest growing retail sector. In 2003 research by AC Nielsen found that 48 per cent of everything bought in UK food stores was bought in out-of-town hypermarkets of over 7,500 square meters in size. More than 24 per cent of these sales are in hypermarkets of more than 12,000 square meters in size.

Wallingford Market

4.10 Wallingford is a minor district centre serving a localised rural catchment area. Wallingford’s role is largely confined to fulfilling the convenience shopping needs of local residents. Retailing is centred on St Martin’s Street and St Mary’s Street. A small number of stores can be found on High Street and Castle Street. There is a small pedestrianised section that encompasses the northern end of St Mary’s Street and part of the Market Place. The only other retailing in the town centre is a small collection of stores in St Peter’s Place.

4.11 Wallingford has an average representation of national retailers with Boots, Lloyds Chemist, Bakers Oven, Wine Rack and Waitrose present. Waitrose has vacated their old store in the town centre on St Martin’s Street and now occupies a new purpose built 2,323 sq m (25,000 sq ft) facility further north along St Martin’s Street at its junction with the High Street. As a consequence the pedestrian floor has also shifted further north. Waitrose, to a certain extent, dominates retailing in the town centre and, as a consequence, causes friction with local independent retailers over the range of products on offer. In addition, because of the dominance of Waitrose there is a perception that the town mostly caters to the higher end of the market with a lack of representation from the value supermarket brands.

4.12 The town offers only a limited amount of comparison shopping led by Pettits, a small independent department store specialising in fashion. The town has a strong representation from independent and local retailers which adds to the unique retail environment. Wallingford is also well known for its antique shops, of which there are four located on the High Street.

4.13 According to the Focus ‘Retailer Demand’ database (as at 22 August 2005) a number of national retailers are currently seeking space in the town, which include Netto, Spar, Superdurug and Sue Ryder (charity shop). A full list of enquires is included as Appendix 3.
Woolworths and Aldi had both previously enquired about locating in the town, with Aldi considering the now vacated Waitrose Store. However, these enquiries were not realised. Recently Aldi has announced plans to spend another £500 million on expansion in the UK. It wants to increase the chain from 283 supermarkets to 500 within the next five years.

4.15 Shopping rents in Wallingford for primary shopping frontage retail accommodation are now at circa £270 - £322 per sq m (£25 - £30 per sq ft).

4.16 Currently prime retail in high street yields in the main South East retail centres are around 5.5%. However, as the retail market in Wallingford is of a more localised nature it would be more appropriate to look at yields of 6% - 7% due to the type of retailers present in the town and their covenant strength.

4.17 With regards to vacancy rates, currently a number of units in the town appear to be vacant, with agents actively marketing a new 82 sq m (885 sq ft) retail unit forming part of new town centre development consisting of a mixture of retail, offices and flats. A new development on St Mary’s Street opposite the vacated Waitrose store has recently been completed with units available to rent from £305.26 per sq m (£28.36 per sq ft). A full schedule of available retail properties in Wallingford can be found in Appendix 4.

4.18 Food and Drink provision in the town is skewed towards the public house sector, with five located within the town centre. Additionally, there are a number of restaurants serving international cuisine, including, Chinese, Indian and a new Italian Bistro. However, there is a distinct lack of representation of national operators, with only a small Pizza Express, which was recently opened. Residents seeking a wider variety often travel to the larger centres of Oxford, Henley and Reading.

4.19 A number of hotels and ‘quality assured’ bed and breakfast facilities are located in Wallingford, benefiting from the towns attractive semi-rural setting. The George Hotel is the largest with 39 rooms. Facilities include a restaurant, bistro, and function/conference facilities. The hotel was one of two bought by Peel Holdings (a private property investment company) for £9.4m in 2002. The Shillingford Bridge Hotel, part of the Forestdale hotel chain, is situated close-by on the Thames tow-path. Additionally, a number of independent quality assured pubs and inns offer rooms on bed and breakfast basis as well as guesthouse facilities.

4.20 In terms of the health and fitness provision in the town, Wallingford Squash and Sports club is located on the High Street along with the Hightone Health and Fitness Club. There is no representation from the national health and fitness operators. Many of the larger operators have scaled down their expansion plans due to the sluggish performance of the economy with analysts predicting increased consolidation across the sector.

4.21 The major competing retail centres to Wallingford are Oxford, located a 20-30 minute drive north and Reading, located a 20 minute drive to the south of the town.

4.22 Oxford is a sub-regional centre and the principal urban area in Oxfordshire. Oxford ranks 32 out of 100 on the Property Market Analysis Retail Provision indicator. City centre retail floorspace in Oxford is estimated at 0.81 million sq ft. The principle shopping streets within the city are Queen Street, High Street, Cornmarket Street and George Street. Oxford is well provided for in terms of department and variety stores with a recently refurbished Debenhams and Primark acquiring the former Alders store. Marks &
Spencer’s and Bhs are also represented in the city. At mid 2005, agents sources estimated prime rents in Oxford at £2,798 sq m (£260 per sq ft) Zone A.

4.23 Reading is one of the principle commercial centres along the M4 corridor and its primary catchment is constrained by the smaller centres of Newbury to the west and Basingstoke to the south. Town centre retail floorspace in Reading at 170,000 sq m (1.83 million sq ft). Reading boasts a very good range of mid-market multiples. In particular, the town has a good representation of fashion retailers. The main shopping thoroughfare in the town is the pedestrianised Broad Street, which includes John Lewis, Marks & Spencer, the Oracle shopping centre and Bhs. At mid 2005, agents sources estimated prime rents in Reading at £2,798 sq m (£260 per sq ft) Zone A, the same level as Oxford.

4.24 Didcot and Henley also draw upon the Wallingford catchment, with a wider comparison shopping offer and a wider selection of upmarket restaurants.

Office Market

M4 Thames Valley Overview

4.25 The M4 office sector has seen good levels of activity during the second quarter of 2005. Reading has experienced significant activity, accounting for 24% of take-up within the sector, boosted significantly by the re-occupation of 7,016 sq m (72,529 sq ft) at 1 Thames Park in Reading. Letting activity within the M4 corridor has remained focussed on good quality second-hand space which accounted for more than 50% of quarter 2 take up. The Information Technology and Pharmaceutical sectors continue to provide the most prominent source of demand for almost half of space required.

Wallingford Office Market

4.26 Wallingford is not an established office market. Main occupiers are local professional firms of accountants, architects, recruitment consultants, solicitors, surveyors/estate agents. These types of firms tend to occupy properties which fit their business needs. Converted residential properties tend to be popular. Accommodation with car parking or access to good car parking is an important factor. One would expect a high degree of owner occupation in the market, with many small firms holding freeholds on their accommodation often as part of the principal’s personal pension plan.

4.27 The rental market does appear strong according to local agents but is characterised by local firms either trading up or down as their businesses expand or contract. Rental values are in the order of £107 – 161 per sq m (£10 - £15 per sq ft).

4.28 A number of quasi public sector firms are located in and around Wallingford. The Centre for Ecology and Hydrology is located nearby in the village of Crowmarsh Gifford, just across the River Thames. The Centre for Ecology and Hydrology (CEH) is the research centre of the Natural Environment Research Council (NERC). From this base, 150 scientists investigate the effects of land-use, climate, topography and geology on the volume and character of surface water resources.

4.29 A high number of environmental/knowledge based businesses are present in the location area due to its proximity to Oxford University and the science park clusters. One such firm is CAB International, a Biosciences firm located outside the town centre adjacent to the A4074 by-pass.
4.30 In March 2003 Fugro, the world's largest integrated geotechnical, survey and geosciences company, acquired a 2.75 ha (6.75 acre) site with outline permission for 12,077 sq m (130,000 sq ft) of offices and light industrial space on Hithercroft Road, Wallingford. The sum paid is reported to have been £3.05m, or approximately £450,000 per acre. Fugro developed a 4,645 sq m (50,000 sq ft) office building on the site for its own occupation, the remainder of the space was developed for light industrial uses.

4.31 Wallingford has witnessed some historic office development with some speculative barn conversions in the late 1990s. The development known as Battle Barns achieved a rent of circa £151 per sq m (£14 per sq ft) on the 1,208 per sq m (13,000 sq ft). Values today are of a similar level.

4.32 Thames Park Business Park on Lester Way is a scheme of nine units developed in 1990 let to mainly Information Technology firms. Currently units 3 & 4 producing a rent roll of circa £44,995 per annum are for sale. South East office yields 7% (Source CB Richard Ellis).

4.33 The office market in Wallingford is overshadowed by more established markets such as Milton Park, Didcot and Henley which has a larger supply of office stock. Major Competing office centres include Oxford, Reading, Didcot and Henley.

**Oxford**

4.34 The historic city of Oxford is the principal urban area in rural Oxfordshire. It is situated on the fringe of the economically buoyant M25 West area, some 50 miles north-west of London. The M40 London-Birmingham motorway lies a few miles away. Oxford's economy is based on its two universities, tourism and the BMW car plant. However, more recently, office-based employment has grown, particularly from the expanding Computer, R&D & Telecoms sector, which comprises a large number of research and biotechnology firms, many spun off from the universities.

4.35 Oxford has a large number of R&D firms. This can be attributed to the expansion of research and development functions in the city, which have evolved as spin-offs from its two universities.

4.36 PMA estimates take up in Oxford to be 7,989 sq m (86,000 sq ft) for 2004, down by 77% from the 2003 figure of 34,281 sq m (369,000 sq ft). The sharp decline over the last year comes from an exceptional peak in 2003.

4.37 Take up of space in Oxford has been focused out of town, as the city's office market is almost entirely located out of town. The historic city centre faces development constraints owing to planning restrictions as well as access, congestion and parking problems. Consequently, there has been very little development in the central area in recent years, while out of town, high quality business parks have rapidly developed.

4.38 Top rents in Oxford were reported to stand at £341.42 per sq m (£31.50 per sq ft) at end-2004. The rent was payable for space out-of-town. The top reported rent in the town centre market at end-2004 was a lower £215.28 per sq m (£20.00 per sq ft).

**Reading**
4.39 Reading is a major commercial centre at the western end of the Thames Valley (or M25 West), the area considered Britain’s Silicon Valley. The town has excellent road (via the M4) and rail access, and is relatively close to Heathrow Airport.

4.40 However, while the high-tech sector has dominated and shaped the market in recent years, it is worth highlighting that Reading has historically been an important regional centre, and so has a more diverse economic base than many other M25 West centres.

4.41 Key office occupiers in Reading include a roll call of the largest global high-tech players including Microsoft, Oracle, Cisco Systems and WorldCom to name but a few. For many firms Reading is their UK or European base.

4.42 While the concentration of such firms resulted in significant growth in demand during the 1990s, the recent high-tech crash has hit the economy hard. However, recent trends must be put in context. While job losses have been seen at a number of firms, the number has not been as great as some headlines would suggest; for many firms the impact has rather been of a shift from rapid growth to consolidation rather than contraction.

4.43 Top rents in Reading were reported to stand at £242.19 per sq m (£22.50 per sq ft) at end-2004. This rent was payable for space in both the town centre and out of town. This near parity of top rents by location - not seen since the early 1990s - highlights the significant erosion of rental differentials that had built up between the two locations during the late 1990s.

4.44 In the town centre, the highest rent recently paid during 2004 was £250.26 per sq m (£23.25 per sq ft), on space assigned at Abbey Gardens by the Prudential to Huntswood.

Residential Sector

National Overview

4.45 During the last five to ten years the UK has experienced substantial growth in house price inflation. This has been fuelled primarily by a stable and robust economy and low interest rates.

4.46 The Nationwide House Price Index indicates that the UK experienced a 15% growth in house prices in 2004. However, in recent months the housing market has slowed and house prices, particularly in southern regions, have softened considerably. In fact, parts of London have encountered a general decline in values.

4.47 The sluggish growth of the UK economy and the subsequent fall in consumer confidence has led to a more cautious forecast for house price inflation over the coming months. Nationwide predicts a 2%¹ rise in house prices across the UK in 2005. This compares to 2004 (15% growth).

4.48 House sales are predicted to fall in 2005 with estate agents at the start of the year reporting a decrease in the number of viewings and uncertainty in the market. However, the recent cut in the base rate to 4.5% (from 4.75%) has helped to revive confidence in the market with values increased by 0.2% in July 2005 over the previous months fall. Current average house price in England and Wales is £158,354 (July 2005).

¹ The Nationwide Building Society
4.49 House price growth in the Southern Home Counties has been particularly slow over the last 12 months. Nonetheless, over the past eight years, robust economic conditions have brought strong property price growth in the above mentioned areas, over 145% in the south and southwest region since 1995 compared to 120% for England and Wales.

4.50 Affordability levels, in relation to the proportion of income used to service mortgage payments, are most stretched in the southern regions. These factors are unlikely to increase spending on housing much further in the near future limiting potential for growth compared to the above average growth in northern regions.

Wallingford Residential Market

4.51 Residential prices in Wallingford are lower than the rest of South Oxfordshire, which commands higher prices. The lack of a railway station has had an effect on the property market in this respect as commuters overlook the location; Thame and Didcot being the nearest rail stations. The catchment has a good AB profile (South Oxfordshire). However, a high proportion of blue collar workers are present due to the employment base of the town.

4.52 Based on Land Registry data the average house price in Wallingford (OX10 postal code) is currently £231,526. The table below illustrates the current house prices for each property type within the OX10 postal code.

Table 4.1: Average House Prices by Post Sector

<table>
<thead>
<tr>
<th>Region/Area</th>
<th>Detached Av Price £</th>
<th>Sales</th>
<th>Semi-Detached Av Price £</th>
<th>Sales</th>
<th>Terraced Av Price £</th>
<th>Sales</th>
<th>Flat/Maisonette Av Price £</th>
<th>Sales</th>
<th>Overall Av Price £</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>OX10 0</td>
<td>362,014</td>
<td>7</td>
<td>196,250</td>
<td>6</td>
<td>188,400</td>
<td>5</td>
<td>134,300</td>
<td>5</td>
<td>231,526</td>
<td>23</td>
</tr>
</tbody>
</table>

Source: Land Registry, Data last updated: 01/08/2005

4.53 A number of small high quality developments have been constructed close to the town centre, which have generally been well received by the market. Retirement properties have also proved popular. The most recent developments of these sites that have occurred in Wallingford have been houses rather than flats, located along St John’s Road. Historically, some infill development has taken place along St Leonard’s Lane of low-density terraced housing.

4.54 Historically, Wallingford has not been a location for volume house building, in part due to a lack of a railway station and a limited retail offer. Good quality, low-density residential development has fared much better in the town with a number of regional developers completing schemes recently. Terraced housing facing main roads and cul-de-sac arrangements are popular, and cater to buyers wishing to purchase in the location as well as blending into the town’s semi-rural setting. The potential demand for Wallingford’s residential market lies in either the retirement market or family buyers priced out of more expensive Oxfordshire towns. Additionally, first time buyers may be able to get on the property ladder if the right type of product becomes available at the right price.

Summary

2 ONS, 2005
The key findings from the property market assessment are as follows:

4.56 **Retail** - Wallingford is a minor district centre with an average representation of national retailers. The town offers a limited amount of comparison shopping and has strong representation from independent retailers. According to retailer demand statistics a number of national retailers are currently seeking space in the town. Shopping rents in Wallingford for primary shopping frontage are circa £270-£322 per sq m and prime retail yields in Wallingford are likely to be 6%-7%.

4.57 **Office** – Wallingford is not an established office market and main occupiers are local professional firms of accountants, architects, recruitment consultants etc. Accommodation with car parking or access to good car parking is an important factor. The rental market is strong according to local agents but is characterised by local firms trading up or down. Rental values are in the order of £107-161 per sq m. The office market in Wallingford is overshadowed by more established markets such as Milton Park, Didcot and Henley.

4.58 **Residential** – Residential prices in Wallingford are lower than the rest of South Oxfordshire, which command higher prices. The lack of railway station has had an effect on property prices. The average house price in Wallingford is currently £231,523. A number of small high quality developments have been constructed close to the town centre which have generally been well received by the market.

4.59 Wallingford is not a large commercial centre and as such any development which takes place must be complementary to the location and its semi-rural hinterland. Large scale residential development may place a drain on existing community infrastructure and a lack of a railway station would diminish the appeal to commuters, although Didcot station is only 4 miles away. Therefore more specialist residential development would be more appropriate perhaps focussing at the lower end of the market as the town is still relatively affordable. There is an adequate stock of office accommodation within the town which absorbes any latent demand which may present itself in this localised market. There is a limited market for speculative large scale office development. Development opportunities within Wallingford which would be well received by the market tend to be in the retail sector as the retail market offers the most room for improvement. The town is dominated by a recently opened Waitrose store which caters well to the high end of the market. However, there is a distinct lack of representation from the value end. To improve the vitality of the town centre environment and prevent retail leakage to competing centres, development of a new food store, particularly if focussed on the value end, would be well received by the market and local residents.
5 REVIEW OF DEVELOPMENT SITES

Description of Site/Sites

5.01 Development opportunities in the town centre of Wallingford are limited to the former Waitrose site, the Lamb Garage Site and the Air Training Corps Barracks.

Lamb Garage Site

5.02 The Lamb Garage Site, Castle Street is a 0.1 ha site located on the approach to the town centre along Castle Street. It is noted in the Local Plan that the District Council would welcome proposals that convert the disused Lamb Garage building into residential use and that if conversion is impractical the District Council will consider demolition, as long as it is in keeping with the town’s urban design characteristics. With this in mind we do not consider the Lamb Garage site to be an opportunity site in terms of enhancing the town’s retail or retail services offer.

Air Training Corps (ATC) Barracks Site

5.03 The ATC Barracks site is approximately 0.05 ha in size and is off the High Street towards the river on the corner of Thames Street and St Peters Street. It is our view that this could be an opportunity site if successful discussions were held with the owners. However, due to the location of the site, being relatively isolated from the main streets, and the small size, we have not considered any detailed development options for this site. The site could be utilised more fully for community uses relocated from the Regal Centre, if full redevelopment were to take place there.

Former Waitrose Site

5.04 The former Waitrose site is a 0.5 ha site and is situated on St Martin’s Street opposite Pettits department store. It comprises a late 1960s premises on two floors with storage and servicing areas at the rear. It is served by Goldsmiths Lane car park which also provides car parking spaces for those wishing to shop in the town centre or visit the Regal Centre. The building itself is run down and not in keeping with the character of the town centre. It faces on to St Martin’s Street which, at that point, is very narrow with little pavement area. There is the Mores convenience store, with post office, located adjacent on the one side and on the other side a narrow alley which leads to the car park. The car park is accessed by car via Goldsmiths Lane. It is overlooked on all sides by residential units. The Regal Centre is set back from the St Martin’s Street frontage and is situated within Goldsmiths car park. It was a cinema, but now provides a centre for community uses. It is possible that the centre could be included in any comprehensive redevelopment options provided that the activities which take place in the centre are not compromised.

Community Buildings

5.05 We have also looked at community buildings around the town centre that could potentially be underutilised and could be used to accommodate the community uses from the Regal Centre, should this be redeveloped. These include the Hall on St Leonard’s Square, the community centre in Bull Croft Park, the Town Hall and the ATC Barracks site mentioned previously.
5.06 An assessment of the scale and frequency of uses that take place in the Regal Centre and other community buildings would need to be undertaken. This would inform the decision on how to accommodate the various uses and where further investment may be necessary.

5.07 To assist in the re-provision of community facilities elsewhere, any planning consent for re-development taking place which included the Regal Centre could include a condition to help facilitate investment in the refurbishment/extension of other community buildings elsewhere in the town centre. This should result in a more efficient use of buildings and better quality facilities.

Former Waitrose Site

Land Ownership

5.08 In terms of land ownership the Co-op owns the actual former Waitrose building, although Waitrose themselves own the former wine department. Waitrose vacated the building before their lease was up, which is due to expire in 2009/10. The car park to the rear of the site is owned by the Co-op and leased to Waitrose. South Oxfordshire District Council owns land to the rear of the car park, and Wallingford Town Council owns the Regal Centre and land to the rear and side of this. The Oxford and Swindon Co-operative Society Limited owns a small plot adjacent to the Regal Centre. Together, these plots provide the parking area for both the former Waitrose site and the Regal Centre, as well as short term town centre parking.

Planning Status

5.09 Policy WAL5 of the South Oxfordshire District Plan states: “Proposals for the change of use or redevelopment of existing Class A1 supermarket building and public car park at 11-16 St Martins Street, Wallingford will not be permitted where those proposals would involve loss of a Class A1 use and public car parking spaces.”

Market Appetite

5.10 The retail market appetite for the town is generally for larger space/units with parking provision. There are no specific areas of the town centre which generate more interest than others. The former Waitrose site itself has had reasonable levels of interest, with five or six occupiers making inquiries since January 2005; these have been from both food and non-food retailers. There are only 4.5 years remaining on the lease and it is believed interest in the site would be greater if the length of time left on the lease was greater. Public parking behind the store is an important factor in the occupier interest.

Development Options

5.11 Various options have been looked at for the former Waitrose site ranging from ‘Do Minimum’ to a complete redevelopment. Of particular importance when considering these options is the positive impact they could have on the town centre as a whole, rather than looking at the site in isolation.

Considerations

5.12 In deriving the development options we have considered the following issues to be of significance:
The options should consider that the car park at the former Waitrose site is currently in good use and near full capacity on a daily basis. As such, any new development should seek to minimise any loss of car parking spaces.

The Regal Centre, which is located within the car park at the former Waitrose site, is currently in use for community activities. However, given the size of the premises it is unlikely that it is being used to its full potential and thus an alternative location could be found within the town.

Following the relocation of the Waitrose, store the southern end of the town has suffered from reduced pedestrian footfall and lack of activity due to vacant space. As such, any development option should consider the need to revitalise this end of the town.

**Do Minimum**

5.13 Find a new tenant for the Waitrose store and enhance the car parking areas.

**Pros**

- Interest from value food operators.
- Improves the town’s retail offer

**Cons**

- Short lease on unfavourable lease terms.
- Poor quality building maintained
- May need to carry out more development in the future
- Potential for a new scheme to revise the town centre not realised (missed opportunity)

**Partial Redevelopment**

5.14 Find a new tenant for a new food store on the site of the former Waitrose store and carry out public realm and frontage improvements to the retail frontage along St Martin’s Street.

**Pros**

- Improvement to buildings and environment
- Interest from value food operators sector.
- Improves the town’s retail offer

**Cons**

- May need to carry out more development in the future
Complete Redevelopment

5.15 Comprehensive mixed-use redevelopment of the site to include housing and a new food store, taking into account nearby opportunity sites.

Pros

- Improvement to buildings and neighbouring environment
- Provision of larger retail units
- Provision of new housing
- Business, residential, community and political aspirations fully met
- Improve the retail offer in the town
- Potential to cross subsidise community projects
- Holistic, high quality regeneration and catalyst for other projects in the town centre
- Potential to set a precedent for change at the southern end of the town centre
- Avoidance of pressure for an hostile inappropriate development coming forward from a third party

Cons

- Issues over loss of car parking (could be overcome with innovative design).

Recommended Way Forward

5.16 The option we would recommend would be a complete redevelopment involving a comprehensive mixed-use scheme, with an active front to St Martins Street and residential component above the retail/commercial units or on the car park. Small-scale good quality residential developments are well received by the market in Wallingford. The current residential values, while at a discount to some parts of Oxfordshire, are still healthy enough to make residential development attractive.

5.17 The retail market in the town is below average - the town seems to have lost its position to the more established centres of Didcot and Henley. A recent study¹ involving business survey data has highlighted falling takings since 2000 within Wallingford which suggests the need for some form of development in order to boost the town’s attraction. Additionally, the larger regional centres of Reading and Oxford are within a 30-minute drive time. Therefore a completely retail only scheme would be difficult to sustain unless a single user could be found.

5.18 Office values are not yet at a level to sustain speculative development.

¹ Study of Wallingford, Lockwood Associates, 2005
5.19 The interests of all stakeholders must be aligned in order to bring about a comprehensive redevelopment proposal. The former Waitrose store only has four years remaining on the lease. Any new retailer wishing to take on this interest would seek a much longer commitment from the freeholder.

5.20 The freeholder of the Waitrose store may have its own agenda to pursue and be seeking to ‘extract best value from their investment’. Best value in their opinion may be pursuing a planning application for a comprehensive mixed-use development of the site before disposing of the site once consent has been obtained.

5.21 The store’s agent has reported good interest from the value food operators and this sector would be complimentary to the town’s existing retailing offer.

5.22 N.B. We have considered alternative scenarios for the Regal Centre, namely retention/refurbishment or relocation to above the foodstore but have discounted these because of their adverse effect on any schemes viability including issues around disabled access, a more expensive building and the elimination of higher value residential units.
6 CONCLUSIONS AND RECOMMENDATIONS

6.01 This section of the report provides our recommendations for improvement and future development within Wallingford.

6.02 The socio-economic assessment, vitality and viability assessment and property market assessment have highlighted a number of important issues regarding the health of Wallingford town centre. It is therefore possible to make the following broad recommendations in order to address these issues:

• High economic activity levels, low levels of deprivation and above average weekly earnings indicate that Wallingford is in a strong socio-economic position and as such should build on its strengths in order to take advantage of the relatively high spending power of its residents. This could include the continued provision of convenience and comparison shopping facilities whilst also stepping up to face competition from nearby district centres. Wallingford should build on its unique character in order to distinguish itself and as such give people a reason for visiting Wallingford as opposed to other centres.

• Retail provision could be improved through the provision of a lower value convenience retailer in order to balance the convenience market and provide for a range of consumers, rather than just those at the higher-end which Waitrose currently caters for.

• Retail services could also be improved, particularly with regard to eating and drinking establishments. Greater outdoor eating provision (e.g. ‘spill-out space’ on pavements) and Sunday openings could be an option in order to cater for weekend visitors and those wishing to enjoy the pleasant town centre environment.

• The quality of the town centre is generally good and Wallingford’s historical character adds a unique and attractive quality to its offer. However, improvements could be made to access points within and around the town centre in order to make it more appealing. These could include better signage and greater emphasis of the town centre at main gateways. Improved access is needed to and from public car parks for pedestrians, and better signage from the River Thames to the town centre. These improvements could help to draw people in towards the town centre as well as improve the sense of safety, particularly for pedestrians using car-parks.

• The public realm within Wallingford is of a high quality. However, more could be made of seating areas around the town centre in order to allow visitors a place to rest and enjoy the views. Although there is some provision around the market place this could be increased, partly through the provision of the afore mentioned outdoor eating areas, but also by adding to the number of seating areas generally.

• Access to and from Wallingford is generally good via a range of transport means. Despite the lack of a train station the bus services ensure that surrounding centres can be reached within a short journey time. Car-parking space is a major attraction in Wallingford to both its visitors and retailers. Facilities are generally good, with reasonable prices and all are well used on a daily basis. We would therefore recommend that any further development in the town centre should involve minimal loss of car-parking space. Access to and from the town centre via car-parks needs further improvement (as mentioned above).
• Improvements to accessibility could also take the form of a greater emphasis on pedestrian movement along St Martin’s Street and into the market place. Due to the relatively narrow street and building height there is a good sense of enclosure along St Martin’s Street (figure 6.1) which naturally slows traffic. With enhancements made to the surface and through the use of street furniture to narrow the carriageway width, further reduction in speed should result, together with additional space for pedestrians. Careful consideration will, however, be needed to ensure that retail units can be serviced adequately without blocking the highway.

![Figure 6.1: Good sense of enclosure along St Martin’s Street](image)

• Wallingford’s tourism potential is not being fully realised. Whilst it is important to maintain the town’s character and in particular its tranquil nature, there are a number of small improvements that could be made in order to attract more visitors. These could include greater emphasis on marketing, re-branding to make more of the town’s major attractions such as the Castle Gardens and Meadows and river setting and greater provision of leisure activities such as eating and drinking facilities.
Development Sites

6.03 In terms of our conclusions and recommendations regarding Wallingford’s development opportunities, our assessment of development site potential has indicated that the former Waitrose site provides the only significant development opportunity within the town centre. Following our site appraisal, the review of the market and high level testing of options, we could recommend the complete redevelopment option which would provide the greatest benefit for the town centre. This would improve the retail offer in Wallingford, and also improve the general quality of the town’s environment.

6.04 The development would comprise a new anchor store and smaller retail units with frontage to the street and residential units above (see artist’s impression, figure 6.2 and indicative layout, Appendix 2). This could incorporate:

- Potential new value food retailer to provide an anchor to the southern end of the town centre complementing the retail offer of Waitrose at the northern end.
- Improved public realm along St Martin’s Street to include improved lighting, signage, footways and the inclusion of street trees. The inclusion of a setback to the retail frontage to create additional public realm to allow for ‘spill-out’ space in front for a potential new café and to act as a gateway to the new store, retail units and car park beyond.
- Improved pedestrian links between the town centre and car park.
- New flats at upper levels providing greater activity in the evening and increased natural surveillance of the street and car park.
- Improved car park environment and servicing provision, but maintaining approximately the same provision of spaces. Trees and other planting to soften the environment and to conceal the servicing to the rear of the retail units.
- New entrance to Mariot Court.
- N.B. The indicative scheme we have illustrated for the development is two to three stories high, which makes it roughly in line with the height of existing premises on the same street. However, should the council be willing to be flexible about their design criteria the viability of the scheme could be improved, for example, by adding another floor above the retail unit.
6.05 In our opinion this option, or one similar, offers the best solution for the site. Whilst a predominantly residential development would realise greater value from the site it would not have such a positive impact on the wider issues of the town centre and would be contrary to the planning policies for the area.
The indicative mixed use development outlined here would increase the retail offer of the town in general and also help to draw additional footfall past existing retail at the southern end of the town. The quality of the townscape would be improved as well as providing some additional residential units in a central location, but without a significant reduction in parking provision.

Our initial research indicates that such a scheme could be viable. However, we recommend that a full financial appraisal is carried out and to confirm our initial view from our analysis, interviews and market appraisal that such a mix and form of uses will be viable. Such a comprehensive appraisal was beyond the scope of this report. Were such an appraisal to indicate that the scheme was fully viable, we would recommend that opportunities are sought to seek the potential contributions from any Section 106 agreement towards the relocation of facilities in the Regal Centre.

We would suggest that this type of development forms the basis for discussion with all stakeholders, including the Council, landowners, potential occupiers and developers and the public. We recommend that, in terms of its involvement of any future scheme, the Council balance its needs for a financial return from its land with the need to ensure delivery of a scheme that would secure the optimal benefits for the town centre as a whole.