South Oxfordshire District Council

RETAIL AND LEISURE NEEDS ASSESSMENT

ROGER TYM & PARTNERS
Planners and Development Economists

Executive Summary

February 2009

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This document is formatted for double-sided printing.

RTP Job Number: P1822

Introduction

1 In November 2007, South Oxfordshire District Council (SODC) appointed Roger Tym and Partners (RTP) to undertake a Retail and Leisure Needs Assessment (RLNA). This study will form an important element of the evidence base for the South Oxfordshire Local Development Framework (LDF) and will guide town centre management within Didcot, Henley-on-Thames ('Henley'), Thame and Wallingford.

2 According to the study's brief, the aims and objectives of the RLNA are as follows:

- Provide a comprehensive overview and analysis of shopping patterns in SODC.
- Identify the position in the shopping hierarchy of Didcot, Henley, Thame and Wallingford and provide advice on the threats and potential need for change to improve their vitality and viability.
- Advice on a strategy for future retail and commercial leisure development within SODC to 2026 including addressing the future roles of the town and village centres.
- Forecast the need for more retail floorspace in Didcot, Henley, Thame and Wallingford over the period to 2026.
- Assess and advise on how any forecasted need should be accommodated in Didcot, Henley, Thame and Wallingford, taking into account retail trends and market demand.
- Assess and advise, in broad terms, the need for new commercial leisure development in Didcot, Henley, Thame and Wallingford over the period to 2026.
- Recommend development options for retail and commercial leisure, including providing advice on individual sites following consultation with the Council and landowners together with a suggested mechanism to bring forward their development.
- Recommend other land use proposals which ought to be included in the LDF relating to such matters as the pedestrian environment, parking and accessibility
- Recommend non land use projects to be contained in future revisions of the Council's Economic Development Plan and the Action Plans for the towns.

3 The RLNA has been undertaken in accordance with the requirements of Planning Policy Statement 6: Planning for Town Centres (PPS6).

Policy Context

4 PPS1 and PPG13 establish the principles of sustainability of accessibility against which this study must be prepared.

5 The existing PPS6 establishes the requirement for a needs assessment to be undertaken and PPS12 sets out the requirement for development plan documents to be sound and be founded on a robust and credible evidence base. The proposed changes to PPS6 do not remove the requirement for a needs assessment at the development plan stage. However, the proposed changes suggest that there will be a greater focus on the impact of developments on town centres at both the development plan and development control stages.

6 The previous retail study was undertaken on behalf of the Council is dated 2000 and thus is now out-of-date, in particular in respect of expenditure and population forecasts, and shopping patterns. Therefore the purpose of the RLNA is to provide an up to date evidence base that can inform the preparation of development plan documents.

7 The development plan establishes the hierarchy of town centres in South Oxfordshire. There are higher order centres outside the district which perform an important regional and sub regional shopping role. The existing role of the town centre in South Oxfordshire is to provide a more localised role, although we note that there is support for growth at Didcot.

8 In addition to the growth in Didcot town centre, the development plan also forecasts housing growth for South Oxfordshire and in particular Didcot. This housing growth is important, since it will provide additional expenditure, which in turn can support additional retail and leisure floorspace.

9 National guidance and the policies in the development plan and emerging development plan documents have been considered carefully when undertaking this study.

Existing Role of Town Centres

Didcot

10 Didcot town centre is located in the west of South Oxfordshire and is ranked 522nd in the MHE Shopping Index 2008 ('MHE Index'), which is the highest of the four town centres in the district and is an improvement from 863rd in 2003/04. The MHE Index provides a hierarchical position for each centre and for Didcot this is a 'District' grade. The centre contains some 28,157 sqm gross of A1-A5 class floorspace which is the second highest in the district, behind Henley. 56% of Didcot's A class floorspace is for comparison goods use. The main foodstore anchoring the town centre is the 4,044 sqm net Sainsbury store located in the Orchard Centre. Didcot town centre is linear in nature, running from east to west and is dominated by the recently constructed Orchard Centre.

Henley

11 Henley town centre is located in the south east of the district and is currently ranked 669th in the MHE Index, a decline from 624th in 2003/04. The centre contains 36,144 sqm gross of class A1-A5 floorspace which is the largest of the four town centres in South Oxfordshire. Some 42% of the A class floorspace in the centre is used by comparison goods operators. The main foodstore anchoring the centre is the 1,640 sqm net Waitrose store located at Bell Street. The centre is broadly rectangular in its layout and is bounded on the eastern side by the River Thames.

Thame

12 Thame town centre is located in the north east of South Oxfordshire and is currently ranked 1,175 in the MHE Index, a decline from 773rd in 2003/04. It is the third

lowest ranked of the four centres. It has 22,276 sqm of class A1-A5 floorspace which is the second lowest in the district, above Wallingford and some 8,880 sqm (40%) of this is in comparison use, although there is a limited offer of clothes and shoes retailers. The main foodstore anchoring the centre is the 2,079 sqm net Waitrose store at Greyhound Lane. The centre is broadly rectangular in shape but extends in a more linear fashion towards the east and west boundaries.

Wallingford

13 Wallingford town centre is located in the south west of South Oxfordshire and is currently ranked 1,950th in the MHE Index, a decline from 1,545th in 2003/04. It is the lowest ranked centre out of the four in South Oxfordshire. The centre contains 19,930 sqm gross of class A1-A5 floorspace which is the lowest of the four town centres in the district. 44% of Wallingford's A-class floorspace is taken up by comparison operators. Wallingford is characterised by its high proportion of independent retailers, which represent 87% of the comparison units. The centre is roughly square with it extending slightly further from north to south than east to west. It is bounded east side by the River Thames.

Out of Centre Floorspace

14 Out of centre floorspace is generally limited in South Oxfordshire. All of the four town centres in the district have town centre foodstores. There is an out of centre Tesco store located at 359 Reading Road, to the south of Henley town centre, which has some 2,541sqm net floorspace.

15 Wallingford Road Retail Park is located in an edge of centre site in relation to Didcot own centre and has four retail units located there which are Tesco, Carpetright, Halfords and Focus.

Existing Role of Villages

16 The South Oxfordshire Local Plan does not specifically identify a retail hierarchy which includes villages and smaller settlements, as retail policy focuses on supporting vital and viable town centres. However, settlements in the district have been categorised by the services and facilities they offer in relation to new housing provision.

17 There are 'larger villages', those inside the Green Belt and those outside the Green Belt, all of which satisfy the five criteria which contribute to their sustainability:

- primary school within the settlement;
- food shop or post office within the settlement;
- population over 1,000;
- public transport to a local service centre more than once a day; and
- community facilities within the settlement (this includes village hall, place of worship or pub).

18 The 'smaller villages' meet three or four of these criteria, and 'small settlements' have two or less criteria. The villages and their classification are set out in Table 1.

Table 1 Villages in South Oxfordshire

Larger villages outside the Green Belt	Larger Villages within the Green Belt	Smaller villages in the Green Belt and Elsewhere	Smaller Villages continued
Benson	Berinsfield	Beckley	Nettlebed
Brightwell-cum-Sotwell	Horspath	Binfield Heath	Peppard common
Chalgrove		Brightwell-cum-Sotwell	Postcombe
Chinnor		Checkendon	Rotherfield Peppard
Cholsey		Clifton Hampden	Sandford
Crowmarsh Gifford		Culham	Shiplake Cross
Goring		Dorchester	South Moreton
Sonning Common		East Hagbourne	South Stoke
Watlington		Ewelme	Stadhampton
Wheatley		Garsington	Stanton St John
Woodcote		Great Milton	Stoke Row
		Kidmore End	Tetsworth
		Lewknor	Tiddington
		Long Wittenham	Warborough
		Little Milton	Whitchurch
		Lower Shiplake	

Source: South Oxfordshire Local Plan

19 Local plan policies support the retention of community facilities within the settlements, whilst restricting the use of non-retail uses.

Existing Shopping and Leisure Patterns

20 Our assessment of shopping patterns is based on a telephone survey of households, which resulted in 1,200 valid responses in the study area. The telephone survey was undertaken in February 2008 by NEMS Market Research. The household survey findings are based on a representative sample, with a minimum of 100 responding households from each of the twelve survey zones, and with all results weighted to reflect the actual distribution of population within the study area. A map illustrating the extent of the study area is attached at Appendix 1.

Comparison Shopping

21 The household survey data shows that the centres of Reading (23%), Oxford (13%), High Wycombe (10%), and Aylesbury (9%) collectively capture 55% of study area comparison expenditure. By contrast, Didcot (6%), Henley (3%), Thame (3%) and Wallingford (2%) collectively account for only 14% of study area expenditure. Abingdon town centre - inside the study area but outside South Oxfordshire - takes 9% of comparison expenditure. The remaining 23% of expenditure is spent in either retail warehouse units (5%) outside South Oxfordshire district or in other destinations outside the study area.

22 The household survey reveals that village catchments are localised, with no clear evidence of villages drawing trade from beyond their local zone. This is consistent with their role at the bottom rung of the shopping hierarchy.

23 The catchment area for Didcot covers zones 9, 10 and 11. The household survey data demonstrates that Didcot achieves the highest market share in zone 10, achieving some 30% of comparison expenditure, with the main competition being Oxford, Reading and Abingdon. Didcot also attracts 16% of the trade in zone 9 and 11% of the trade in zone 11.

24 The Henley catchment extends to zones 5 and 6. Henley attracts 29% of the trade from zone 6 and 12% of the trade from zone 5. The main competition to Henley is Reading and to a lesser extent High Wycombe. Surprisingly, Henley attracts only a small proportion of trade (4%) from zone 7, even though it is located immediately to the south east of the town.

25 The Thame catchment includes zone 2, which immediately surrounds the town, and the more rural zones 1 and 3 to the north and west. Thame attracts 24% of its expenditure from zone 2, with its main competition being Aylesbury. To a lesser extent, Thame draws trade from zone 1 (11%) and zone 3 (7%).

26 The Wallingford catchment is localised to zone 9. The household survey data demonstrates that Wallingford attracts some 16% of the comparison expenditure from this zone 9, which is identical to the proportion attracted to Didcot. In addition, Wallingford suffers from competition from Reading and to a lesser extent Oxford.

Convenience Shopping

27 Outlets in certain zones can be seen to have a wide influence over other zones. Thus, those located in zone 2 (i.e. mainly in Thame) also have substantial market shares in zones 1, 3 and 4 together with some influence in all other zones. Similarly, outlets in zone 10 (mainly in Didcot) also have substantial shares in zones 9 and 11, with some influence in several other zones.

28 Turning more specifically to the centres, the stores in zone 10 for Didcot have a high retention level of 85%, which is a benefit of a large Sainsbury and Tesco.

29 In Henley, if we look at zones 5 and 6 together (since the out of centre Tesco is in zone 5), both zones have a relatively high localised retention level. More specifically, 93% of the convenience expenditure in zone 5 is spent in stores in zone 5 or 6. Similarly 75% of the convenience expenditure in zone 6 is spent in stores in zone 6 or 5.

30 For Thame, the stores in zone 2 have a retention level of some 65%, but as explained above the stores in this zone draw trade from the outer rural zones 1, 3 and 4. This demonstrates the wide attraction from the foodstores in Thame.

31 In Wallingford, only 51% of the convenience expenditure is retained in this zone, with a further 35% travelling to stores in the neighbouring zone 10, which includes the stores in Didcot.

Leisure Activities

32 Didcot attracts some 27% of the food and drink expenditure in zone 10, with a further 20% being spent in Wallingford. Similarly, in zone 9, 37% of the expenditure is spent in Wallingford and a further 28% being spent in Didcot.

33 Turning to Henley, 93% of the food and drink expenditure in zone 6 is spent in Henley, with the town also attracting 49% of the expenditure from zone 5. This high retention level is reflective of the leisure function for food and drink uses we identified in the town.

34 Thame is also successful and attracts 84% of the food and drink expenditure in zone 2. It also has an influence over zone 1 (28% of expenditure) and zone 3 (24% of expenditure).

Implications of Shopping and Leisure Patterns

35 The comparison goods patterns demonstrate the influence of other town centres outside South Oxfordshire. Importantly, South Oxfordshire suffers competition from both higher order centres such as Oxford and Reading and centres such as High Wycombe, Aylesbury and Abingdon. The only centre in South Oxfordshire that is achieving a notable market share for comparison goods is Didcot.

36 The convenience shopping patterns demonstrate a much more localised activity, which is due to the presence of at least one large foodstore in each of the four town centres in South Oxfordshire. There is limited convenience expenditure leakage and notably the stores in Thame exert an influence over a large proportion of the northern part of the study area.

37 Turning to leisure, many of the patterns are determined by what facilities are already available, with Oxford and Reading being particularly prominent. However, on the food and drink aspect, the four towns in South Oxfordshire are successful in retaining expenditure, with Henley and Thame more successful than Didcot and Wallingford.

Market Context

Expenditure Growth

RTP Approach to Expenditure Growth

38 We prefer the forecasts (produced by both MapInfo and Experian) in preference to the trend based projections. This is because both sets of forecasts are both consistent with the past trends projections and are also based upon expected changes to other key economic variables.

39 For comparison goods expenditure, the growth is forecast to range from 3.5% per annum (2007-2016, Experian) to 5.3% per annum (2005-2017, MapInfo). Both of these forecasts are slightly higher than the rates previously advocated by MapInfo and Experian, but are less ambitious than the trend based projections. For convenience goods the growth is forecast to range from 0.8% per annum (2005-

2016, Experian) to 1.2% per annum (2005-2017, MapInfo). Our locally derived expenditure data for the study area is supplied by MapInfo and thus to maintain consistency with this data, we adopt the MapInfo forecasts, as follows:

- Comparison goods: 5.3% per annum.
- Convenience goods: 1.2% per annum

40 The growth rates that we have used remain consistent through the timeframe of the study, although it is appreciated that the forecasts end at 2016. Therefore, less weight should be given to the forecasts for the 2016 to 2026 period since data for growth rates over this period are unavailable.

Sales Density

41 When assessing the future for retail sales densities, Experian explains that the rapid increase in comparison sales densities in the recent past was a product of the retail spending boom and is unlikely to be sustainable. Their projections are 2.2% per annum for comparison floorspace and 0.6% per annum for convenience floorspace, although it is noted there is no timeframe for these projections.

Retail Polarisation

42 Various data sources from organisations such as Management Horizons, Experian and from the Inland Revenue's Valuation Office confirm that larger town centres, in general, are becoming stronger (lower yields), at the expense of the smaller and weaker town centres.

43 The polarisation trend has been driven, in large part, by retailers seeking the economies of scale which derive from operating in larger stores which are able to command wider catchments. However, polarisation has also been driven by consumer demand in that people have become increasingly discerning and willing to travel further to attain a wider choice in the range of comparison goods on offer.

44 In the convenience sector, a different form of polarisation has occurred whereby the large superstore operators have gained an ever increasing market share at the expense of independent convenience traders and smaller supermarket operators.

Special Forms of Trading

45 Until recently there has been considerable disagreement on e-tail's current and potential market share. However, Experian's Retail Planner Briefing Note 2.3D (December 2005) provides estimates and projections of the share of Non-Store Retail Sales (of which e-tail has the majority share) as a proportion of total UK spending. These estimates have been updated and are re-produced in Experian's Retail Planner Briefing Note 5.1. We treat these 'Non-Store Retail Sales' as Special Forms of Trading (SFT).

46 Experian estimates that SFT had a comparison retail market share of 7.1% in 2004, and projects that this will increase to 8.8% in 2006, to 12.1% in 2008 and 14.1% in 2011. Experian envisages that the rate of SFT growth will slow in the post-2011

period, with non-store sales in the comparison sector plateauing at around 14.4% between 2013 and 2016.

47 Experian estimates that SFT accounted for 2.5% of total convenience retail sales in 2004 and projects that this share will rise to 3.6% in 2006, to 5.6% in 2008, to 7.0% in 2011 and to 7.3% by 2013, from which point it is forecast to remain constant to 2016.

Leisure Expenditure

48 Restaurants, cafés and bars account for three fifths of the UK spend on leisure. Commercially orientated property developments, such as cinemas, account for only a proportion of the expenditure on cultural services, with bingo halls accounting for a small proportion of expenditure on games of chance.

Economic Climate

49 Economic forecasts for future growth are sensitive to the prevailing economic conditions and recent trends. Therefore, the forecasts that we have used should be monitored carefully and the assessments updated. This is particularly important in relation to the timing of development. In a sense the effects of an economic downturn is to slow down the rate of consumer expenditure growth and delay project development. It is rare that projects are permanently deferred. So monitoring of consumer expenditure trends should play a key role in determining the timing of South Oxfordshire's overall long term development programme.

Retail Need

Population Growth

50 The major concentration of new dwellings is around Didcot (zone 10) where the population is expected to increase from 34,200 in 2007 to 44,600 in 2016 and 49,600 in 2026. Smaller concentrations of new construction are around Abingdon (zone 12), Wallingford (zone 9), Thame (zone 2), Henley (zone 6), in the west (zone 11) and the southeast (zone 7). Elsewhere, the rate of construction is much lower and declining populations are projected.

51 The population of the study area is projected to rise from 319,200 in 2007 to 332,200 in 2016 and 342,700 in 2026.

Comparison Goods

Quantitative Assessment

52 Our quantitative capacity assessment has indicated that there is residual expenditure to support new comparison floorspace in the forthcoming LDF timeframe. For Didcot, this assessment is based on an increased market share from 30% to 45% in zone 10, an increase from 11% to 16% in zone 11, in zone 9 from 16% to 19% in zone 9, in zone 3 from 4% to 7% in zone 3 and from 2% to 5% in zone 12. These floorspace requirements are set out in Table 2. The requirements with a lower growth rate applied are in Table 3.

Table 2 Additional comparison floorspace requirements (net sqm)

	2011	2016	2021	2026
Didcot	11,848	18,333	24,616	31,824
Henley	1,188	2,795	4,741	6,939
Wallingford	855	2,039	3,336	4,816
Thame	783	1,833	3,101	4,523

Source: Appendix 14, Tables 8, 10, 12 and 14

Table 3 Additional comparison floorspace requirements (net sqm) - sensitivity

	2011	2016	2021	2026
Didcot	9,711	13,070	15,544	18,083
Henley	438	947	1,562	2,178
Wallingford	421	933	1,407	1,888
Thame	249	531	884	1,235

Source: Appendix 15, Tables 8, 10, 12 and 14

Qualitative Assessment

53 In the Didcot zone, there remains expenditure leakage to the larger nearby centres such as Oxford, Reading and Abingdon. Therefore, we consider that there is an opportunity to meet the qualitative deficiencies in Didcot by aiming to increasing the market share further by delivering a further development through an increased choice of comparison goods outlets.

54 For Henley, although our healthcheck assessment revealed a vibrant town centre, Henley has lost a significant proportion of local trade in the last eight years. Although it has developed its leisure role and has a good range of bars and restaurants, the retail businesses have suffered, a point supported by comments at the stakeholder consultation event. Therefore, from a retail perspective, there is a qualitative requirement to try and accommodate some of the demand and ensure that the market share does not decrease any further in light of increased competition from centres such as Reading. This qualitative need would be met by overcoming the constraints within the centre and providing larger retail units to attract further high profile operators to the centre.

55 For Thame, in the short term, there is no clear qualitative deficiency for comparison goods floorspace as Thame is performing well in its role in the retail hierarchy and in light of increasing challenges from competing developments. However, as the competition increases, there is likely to be a qualitative requirement to diversify its comparison offer to ensure that Thame maintains its market share.

56 For Wallingford, in qualitative terms, we consider that there is need to diversify the retail offer to ensure that Wallingford maintains its attraction and at the minimum maintains its market share over the next twenty years.

Convenience Goods

Quantitative Assessment

57 Our capacity assessment has identified sufficient residual expenditure to support new retail floorspace. It is only in the Didcot zone (number 10) that requirements are large enough to support a major foodstore of 2,000 sqm or more, the remainder of the requirements are based on the lower sales density and therefore would accord with smaller foodstores. The requirements for the South Oxfordshire centres, for Abingdon and for the balance for the study area are set out in Table 4.

Table 4 Additional convenience floorspace requirements (net sqm)

	2011	2016	2021	2026
Didcot (Zone 10)	1,047	2,319	3,220	4,124
Henley (Zones 5 and 6)	407	866	1,565	2,257
Wallingford (Zone 9)	291	630	1,049	1,467
Thame (Zone 2)	321	672	1,238	1,795
Abingdon (Zone 12)	643	1,388	2,357	3,322
Balance in study area (Zones 1,3,4,7,8,11)	507	1,054	1,996	2,923

Source: Appendix 14, Tables 23, 25, 27 and 29

58 The requirements are driven by the market share in the zones for the centres in question. There is a balance of requirements that is driven by foodstores in the other zones.

Qualitative Assessment

59 Didcot benefits from a large Sainsbury's store and a large out of centre Tesco store. The visitor survey did not identify any clear message that a further foodstore would be required in the centre. Therefore, we do not find any qualitative need for a further large foodstore in this zone. There are also two smaller Co-op stores and a Tesco Express in the surrounding urban area, which contributes to the convenience shopping choice. The only missing type of operator is a deep discounter, such as a Lidl or an Aldi, which could benefit the local choice.

60 Henley includes a Waitrose store in the town centre, whilst a Tesco store is located in an out of centre location. These are the two main foodstores that serve the Henley catchment, although there is also a smaller Somerfield store in Sonning Common to the west of Henley in the surrounding rural area. There are no deep discounters or smaller foodstores in Henley, which limits the choice to the two larger foodstores.

61 In Thame, there is a large Waitrose store, together with a smaller Co-op and a Sainsburys Local located slightly outside the main town centre. In addition, to the west in Wheatley village there is a larger Asda store a smaller Co-op store, whilst to the south there is a further Co-op in Chinnor village. Overall Thame has a good range of foodstores both in the town centre and in the surrounding rural areas.

62 The foodstore provision in Wallingford is dominated by the Waitrose store in the town centre. In the surrounding villages, there is a Tesco Express in Cholsey to the south and a Co-op and Somerfield in Benson to the north. Other than the Waitrose store, there is limited choice in Wallingford and means that residents would have to travel to Didcot to do their main food shopping if they did not wish to use Waitrose. Therefore, we consider there is a qualitative need to improve the choice of foodstore within Wallingford town centre.

Leisure Need

63 The assessment of leisure need is not modelled in as much detail as our retail assessment. However, it provides an indication of the floorspace requirements for the A3, A4 and A5 uses. The indicative floorspace requirements for A3, A4 and A5 uses are set out Table 5:

Table 5 Additional A3, A4 and A5 floorspace requirements (gross sqm)

	2011	2016	2021	2026
Didcot	1,015	1,667	2,238	3,834
Henley	724	1,637	2,702	2,854
Wallingford	340	784	1,187	1,621
Thame	252	566	943	1,343

Source: Appendix 14, Tables 36, 38, 40 and 42

64 In respect of other commercial leisure facilities, the requirements are more difficult to quantify. However, given the likely local expenditure growth over the next 20 years on leisure activities (as modelled in Tables 43 to 49), there will be scope to expand the leisure offer in the town centres. The broad quantum of expenditure growth for the main leisure categories across all zones in the study area is set out in Table 6.

Table 6 Growth in leisure expenditure in all zones (£m)

	2011	2016	2021	2026
Recreational and cultural services	234.9	264.2	296.6	332.1
Restaurants	554.5	623.9	700.3	784.2
Hotels	103.7	116.6	130.9	146.6
Hair and personal grooming	40.7	45.8	51.4	57.5

Source: Appendix 14, Tables 43-49

Town Centre Strategies

Didcot

65 On this basis of an increased market share for Didcot, we have projected a need for some 14,100 sqm (net) of total retail sales floorspace by 2011 (including A1 service and A2 uses) and a further 8,300 sqm (net) by 2016. When including A1 and A2

service uses and converting the requirements to gross (using a 70% net to gross ratio), this would justify a total gross floorspace requirement of some 32,000 sqm by 2016.

66 In addition, we have projected a requirement for some 2,200 sqm of A3, A4 & A5 space in the period to 2016. Thus by 2016, there would be justification for the development of some 34,200 sqm of gross retail and non-retail service/leisure uses in Didcot. Thereafter, we project a requirement for a further 24,600 sqm of gross A1-A5 retail space by 2026. This is set out clearly in Table 7.

Table 7 Didcot Floorspace Requirements

	2007- 2011	2007- 2016	2007- 2026
A1 comparison sqm net	11,900	18,300	31,800
A1 convenience sqm net	1,000	2,300	4,100
A1 service/A2 sqm net	1,200	1,800	3,200
Total sqm net for A1/A2 uses	14,100	22,400	39,100
Total sqm gross for A1/A2 uses	20,200	32,000	55,900
A3, A4 and A5 sqm gross	1,000	2,200	2,900
Total sqm gross for A1-A5 uses	21,200	34,200	58,800

Source: Appendix 14 (it is assumed that the A1 service/A2 requirements are 10% of the net comparison requirements, that the convenience floorspace is based on a high sales density for large supermarkets and there is a 70% net to gross ratio used for all floorspace).

67 In addition to these retail and A3, A4 and A5 leisure uses, there is a need which has been articulated by SODC jointly with the young people of Didcot for a much fuller range of active leisure activities. The adults at our stakeholder workshop also referred to this requirement. As we have already noted, Didcot has a Bingo club catering mainly to adults and the Council's new Cornerstone Arts Centre will provide theatre and multi-use space catering for both adults and children.

68 Whilst there is a small skate park in Didcot, there is generally a dearth of facilities for more active leisure pastimes such as ice skating, bowling, basketball and indoor 5-a-side football. Didcot's projected catchment population growth means that some of these activities should be provided commercially. Alternatively, they could be provided in conjunction with the Council, if some of the capital cost of construction could be cross-subsidised.

69 It would also be desirable to consider the provision of a small to medium sized night club venue as part of the development of phase two of the Orchard Centre by 2016. This would be in addition to the 2,200 sqm of A3, A4 and A5 floorspace.

70 The first phase of the Orchard Centre has not directly helped regenerate the Broadway due to the poor integration of the new development with the traditional town centre of Didcot. This is due to the access arrangements, the location of the new service yards and the change in levels. The challenge to be faced is how best to implement the second phase of the Orchard Centre so that it will relate both to the first phase and to the Broadway. In our view, the change in levels will

necessitate at least two floors of retail/leisure development at the Hitchcock Way side of the development site so that a link at ground floor level with the Broadway can be achieved.

71 SODC and Hammerson have commissioned urban designers Roger Evans to prepare a development concept for the site. We recommend the following inputs to the initial thinking about potential development concepts:

- The site is sufficiently large to bring forward a full range of retail uses providing at least 25,000 sqm of gross retail floorspace and passive leisure (A3, A4 and A5) uses by 2016, together with additional floorspace for a night club and one of the active leisure uses which we have referred to at paragraph 9.11 above.
- Every opportunity should be taken to provide for both larger unit sizes, including the proposed department store, as well as some smaller units for independent operators.
- Didcot is not well supplied with fashion shops for young males, sports goods shops, mother and baby goods, jewellers, books and record shops and quality household durables. There should be a letting policy geared towards filling the gaps in current provision if this objective can be achieved in market terms.
- The second phase of the Orchard Centre should be integrated well with Broadway.

72 Elsewhere in Didcot the key focus should be on measures to improve the trading environment of Broadway, including:

- Introduction of additional car parking on the southern side of the Broadway opposite WH Smith
- Adjustment to traffic light sequencing to reduce congestion along the Broadway and thus improve the air quality of this part of the shopping environment
- Improved linkages with the railway station
- Appointment of a town centre manager with a brief to work on the promotion of the whole of Didcot rather than simply the Orchard Centre.

Henley

73 What is clear, however, is that it is not an option to “do nothing”, despite the difficulties in bringing forward more development within the town centre or on its edge. Such constraints include the historic core of the town, with its listed buildings, archaeology and burgage plots, which provide limited opportunities for new development in the town centre. Whilst the town’s outwards growth is heavily constrained by the river Thames on one side, and the Chilterns Area of Outstanding Natural Beauty and areas of high quality landscape on the other.

74 In the context of a study intended to inform the emerging DPDs, we consider that once the current programme of Action Plan works has been implemented, the key priority for Henley is to seek to improve its retail offer and, thereby, enhance footfall and dwell times, so that the town will attract more spending. It is important for Henley to both retain trading levels during the current economic downturn and, in the medium term, regain market share. In our view, the key mechanism for achieving this outcome is both to accelerate the pace of retail development in

Henley on the sites which we have identified and, to improve central area car park provision. In summary, the following key steps need to be undertaken over the next two to three years:

- Encourage the implementation of the Market Place Mews development.
- Agree planning briefs and a site development strategy for the development of the Greys Road/ Reading Road and Station car park sites with the owners.
- Progress these as retail allocations in an appropriate DPD.
- Assist development of the sites through site assembly if necessary.

75 The key challenge is how to incorporate additional floorspace within the town centre and thereby increase footfall and dwell times (i.e. the time visitors spend in the centre). At present there is only 1,390 sqm of vacant floorspace against immediate operator requirements for up to about 9,000 sqm of retail and service use space. On a conservative assumption of constant market share, by 2011 we project a need for some 1,700 sqm net of retail sales space (including A1 service and A2 floorspace), which increases by another 2,300 sqm net by 2016. Thus, by 2016, there would be a need for an additional 4,000 sqm net of additional retail sales space, which would represent 5,700 sqm gross. Thereafter, by 2026 we project a requirement for some 14,100 sqm of retail sales space. The full requirements are set out in Table 8. These estimates could increase if it is decided to deliberately target a higher share.

Table 8 Henley Floorspace Requirements

	2007- 2011	2007- 2016	2007- 2026
A1 comparison sqm net	1,200	2,800	6,900
A1 convenience sqm net	400	900	2,300
A1 service/A2 sqm net	100	300	700
Total sqm net for A1/A2 uses	1,700	4,000	9,900
Total sqm gross for A1/A2 uses	2,400	5,700	14,100
A3, A4 and A5 sqm gross	700	1,600	3,800
Total sqm gross for A1-A5 uses	3,100	7,300	17,900

Source: Appendix 14 (it is assumed that the A1 service/A2 requirements are 10% of the net comparison requirements, that the convenience floorspace is based on a low sales density for small stores and there is a 70% net to gross ratio used for all floorspace).

76 It should be noted that the retail requirements set out in Table 8 do not include the Market Place Mews development, which has recently achieved planning permission. This would accommodate approximately 50% of the requirements to 2011.

Thame

77 At present there is only some 150 sqm of vacant space in Thame against operator requirements for up to some 2,000 sqm of retail and non-retail uses (i.e. A3, A4 and A5 uses). By 2011 we project a need for up to about 1,200 sqm of net retail sales space (including A1 service and A2 uses). By 2016 the quantitative need will have

grown by an additional 1,500 sqm. Thus, by 2016 there is growth in spending to justify an additional 2,700 sqm of net retail sales space. Thereafter, by 2026, this requirement will have more than doubled reaching 6,700 sqm net. When converted to gross, the 2016 requirement is 3,900 sqm, increasing to 9,600 by 2026. The requirements are set out in Table 9.

Table 9 Thame Floorspace Requirements

	2007- 2011	2007- 2016	2007- 2026
A1 comparison sqm net	800	1,800	4,500
A1 convenience sqm net	300	700	1,800
A1 service/A2 sqm net	100	200	400
Total sqm net for A1/A2 uses	1,200	2,700	6,700
Total sqm gross for A1/A2 uses	1,700	3,900	9,600
A3, A4 and A5 sqm gross	300	600	1,300
Total sqm gross for A1-A5 uses	2,000	3,500	10,900

Source: Appendix 14 (it is assumed that the A1 service/A2 requirements are 10% of the net comparison requirements, that the convenience floorspace is based on a low sales density for small stores and there is a 70% net to gross ratio used for all floorspace).

78 The following range of public realm improvements and changes to car parking provision were suggested at the Thame stakeholder workshop and should be addressed in more detail as part of the urban design study which we have recommended:

- Consider moving the market from the Upper High Street car park to the High Street behind the Town Hall, in order to free up the Upper High Street car park on market days.
- Remove car parking from the Shambles and repave this area to enable the area to be used for new outdoor uses.
- Introduce another pedestrian crossing on Cornmarket
- Improve signage and linkages for car parks
- Actively manage car parks so as to free-up the central spaces for shoppers and encourage workers and long stay visitors to park in the more peripheral car parks.

79 The objective should be to use the opportunity of the Cattle Market redevelopment site (approximately 0.9 ha) to achieve a more balanced mixture of national operators, independent niche retailers and more bars and restaurants within a high quality setting. Up to 6,000 sqm gross of retail and leisure floorspace could be provided on two levels (or 3,000 sqm gross on one level) as part of a mixed use redevelopment. It is appreciated that this is higher than the existing allocation in the Local Plan and the forecast requirements by 2016, but we consider this quantum of floorspace necessary in order to deliver the development and provide a further attraction for Thame so it can continue to maintain its market share in light of increasing competition from nearby town centres. More specifically, we recommend that the emerging DPDs identify the Cattle Market site for larger retail

units than are already provided in Thame town centre (i.e. units over 200 sqm), together with an associated specialist food court and wine bar theme.

80 Links between the site and the rest of the town centre via North Street will need to be much improved so that the benefits of the Cattle Market redevelopment spill over into the rest of Thame. This will be an important part of the brief for the development of the site to be prepared in conjunction with the Council's strategic advisors. We recommend that SODC appoints an urban design consultant to prepare an urban design concept to effectively link the Cattle Market site to a revitalised North Street which is 'animated' so that it becomes a key node between Cattle Market and the rest of the town centre. In addition, the brief for the urban designer should then extend beyond the Cattle Market/ North Street link to encompass the rest of the town centre

Wallingford

81 At present there is a substantial amount of vacant space (1,940 sqm), much of which is in the old Waitrose store. Current requirements for representation by retail and non-retail service occupiers total 1,700 sqm at most. By 2011 we project a need for 1,200 sqm net of additional retail sales space (including A1 service and A2 floorspace). By 2016 we project a need for an additional 1,600 sqm of retail sales space, which is a total of 2,800 sqm net. This translates to a gross requirement of 4,000 sqm by 2016. The total retail requirement between 2007 and 2026 is 7,300 sqm gross in order to maintain Wallingford's market share. These requirements are set out in Table 10.

Table 10 Wallingford Floorspace Requirements

	2007- 2011	2007- 2016	2007- 2026
A1 comparison sqm net	900	2,000	3,300
A1 convenience sqm net	300	600	1,500
A1 service/A2 sqm net	100	200	300
Total sqm net for A1/A2 uses	1,200	2,800	5,100
Total sqm gross for A1/A2 uses	1,700	4,000	7,300
A3, A4 and A5 sqm gross	300	800	1,600
Total sqm gross for A1-A5 uses	2,000	4,800	8,900

Source: Appendix 14 (it is assumed that the A1 service/A2 requirements are 10% of the net comparison requirements, that the convenience floorspace is based on a low sales density for small stores and there is a 70% net to gross ratio used for all floorspace).

82 In the short term, in quantitative terms the demand for additional representation could be met through the re-occupation of vacant space. However, it is SODC and Wallingford Town Council's intention to promote the redevelopment of the vacant old Waitrose store and associated land at the back, including the Regal Centre site, for a major mixed use development. We understand that this is also the intention of the owners of the vacant store (the Co-op) once the lease on the former Waitrose store lapses. This project has been mooted for some time and is urgently needed to

stimulate trading conditions in the town. A development brief is being prepared for the site.

83 Wallingford urgently needs deliverable action to improve its competitive position and ensure that it develops its role as a separate shopping destination with a niche market. Key to this is the implementation of the old Waitrose/Regal Centre redevelopment so that more retail provision can be made in the historic centre of town linked to the Market Place improvements and the environmental proposals set out in the Civic Trust's proposals. The pedestrianisation and car park upgrade proposals will complement these actions but the priority must be to implement the major development project, so as to achieve an increased turnover in the town and beneficial linked trip spending.

Strategic Direction for LDF and Economic Development Strategy

Hierarchy of Centres

84 Our advice is that in the period to 2016, the policy aspiration should be to consolidate Didcot's status as a major district centre, whilst monitoring and evaluating the function of Didcot once the further expansion of the centre has been built in order to assess its evolving performance and role in the retail hierarchy.

Strategic Direction for Development

85 Our recommended strategic direction is as follows:

- A further town centre development of up to 25,000 sqm (gross) retail and leisure floorspace should be supported for Didcot town centre in the period to 2016 in order to elevate its role in the shopping hierarchy.
- Modest growth in Henley, Thame and Wallingford should be supported to respond to the local circumstances of each centre and in order to support and improve their vitality and viability in respect of increased competition from centres outside the district.

Key Actions for Town Centres

86 Our town centre strategies include a series of action points that we recommend are incorporated into the relevant DPD in order to ensure that the strategies are deliverable. These are summarised below.

Didcot

- Promote the second phase of the Orchard Centre to provide the full range of retail and leisure uses of at least 25,000 sqm (gross).
- Ensure that the second phase of the Orchard Centre is well integrated with the Broadway.
- Support expansion of commercial floorspace in the town centre in order to develop Didcot into a fully functioning major district centre with a wide range of town centre uses.
- Introduce car parking on the southern side of the Broadway and adjust traffic light signals to reduce congestion and encourage visitors to use this part of the town centre.

- Improve linkages between the town centre and the railway station, which will contribute to improved accessibility for the centre.
- Improving linkages and accessibility within the town centre for all visitors including the provision of a shop mobility scheme

Henley

- Encourage the implementation of the Market Place Mews development
- Promote the redevelopment of the Greys Road/Reading Road site using retail allocations and compulsory purchase powers if appropriate.
- Subject to the Council being satisfied that there would be a positive contribution to the town centre, promote the station car park site for a mixed use development to include a bulky goods store or discount foodstore.
- Expand the Greys Road car park, create a new car park in the backland area behind Duke Street/Hart Street/Friday Street and encourage increased use of the Station car parks.
- Introduce a car park management system to improve the distribution and turnover of parking spaces.

Thame

- Promote the redevelopment of the Cattle Market site as a retail led mixed use scheme providing a range of larger store sizes and an attractive food and bar leisure component.
- Ensure that the redevelopment of the Cattle Market site is well integrated with the existing town centres by setting out urban design guidelines in the relevant DPD.
- Introduce an active programme of town centre management to promote the town centre, such as encouraging Sunday trading and enhance the urban environment.

Wallingford

- Promote the redevelopment of the former Waitrose/Regal Centre site for a retail-led mixed use development which would incorporate some larger floorplate stores as well as some smaller units.
- Encourage the delivery of the Civic Trust's proposals to pedestrianise the Market Place.
- Facilitate the upgrading of car parks, in particular the provision of replacement car parking as part of the former Waitrose site development with improved linkages with St Albans car park, the reconfiguration of the Cattle Market car park and improved car parking signage throughout the centre.

Role of Monitoring

87 To establish whether the requirements for new floorspace (by type) are being met, the Council should monitor:

- Planning permissions (amount, type and location)
- Completions (amount, type and location)

88 Changes of use should also be monitored, in particular within the villages. However, it is acknowledged that some changes of use are not 'development' and do not require express planning permission.

89 To establish whether new developments and environmental improvements are improving the health of the centres, the Council should also update key healthcheck indicators – such as retail rents – each year.

90 The recommendations set out in this report may need to be adjusted, in future, due to changing market conditions, demographic changes the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, such as those relating to expenditure growth and internet expenditure, change. The role of monitoring is important in highlighting changes in the assumptions that underpin this study.